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# **Applying a stratified systems theory framework for creating an organisational leadership development architecture**

by

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**2021**

**ORGANISATIONAL LEADERSHIP DEVELOPMENT ARCHITECTURE WITH  
STRATIFIED SYSTEMS THEORY**

**DECLARATION**

I certify that the *thesis* submitted by me for the degree Doctor of Philosophy (Human Resource Development) at the University of Johannesburg is my independent work and has not been submitted by me for a degree at another university.

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(JJH Hanekom)



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## **ABSTRACT**

It is widely reported that leadership and its development are important to organisational performance and sustainability. Such development, arguably, contributes to a greater leadership capacity; or a leadership capacity better aligned or better positioned to shape the organisational strategic context.

The view is adopted, with this study, that fundamental frameworks are required in strategic human resource management and leadership development for leadership development to be effective in organisations. This study, in light of the aforementioned, sets off to explore architecture for organisational leadership development. Such architecture comprises of contextual considerations together with choices associated to those considerations. The choices exercised affect the leadership development system. Understanding those considerations and logics to choices, allows for an appreciation of organisational strategic context, and leadership development systems, to discern an optimal function of a development system or design one.

Architecture, as explained in this study, is built on a different understanding of the use of the architecture metaphor in human resource management. The typical use of the architecture metaphor considers architecture as the set of human resource management philosophies, policies and practices or combinations of the above. In this study, architecture is considered, as a framework of considerations with associated choices that affects the design and function to a development system as a whole.

This is a grounded theory study that examines perceptions and experiences of participants about leadership development systems, and matters that influence such systems. Data is collected from participants who can provide insight in leadership development systems, and matters that influence such systems. Locations where leadership development systems can be found is not of interest. Participants to the study are based in Johannesburg, South Africa, and have a wealth of national and international experiences in leadership development. The intent with this grounded theory study is to examine perceptions of leaders in leadership development, and to integrate those perceptions with abstract constructs in developing a theoretical framework as organisational leadership development architecture.

From the analysis of filed data emerged an architecture consisting of four default

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development systems, each with its own respective characteristics, or logics that respond to different strategic contexts. The fundamental constructs to the four default development systems are choices to (a) the predominant disposition the organisation hold to value creation, and (b) the leadership system's pattern to its thinking capacity.

The four default development systems, with their logics, are linked to organisational strategy complexity by making use of a Strata Frame based on Stratified Systems Theory. This provides a dynamic logic to the architecture as any one of the default development systems is considered to better align to specific organisational strategy drivers and associated strategic complexity.

The study did not consider any specific Human Resource Development policies and practices as what might typically be considered with Human Resource Management architecture. The view with this study is that architecture provides a series of contextual considerations as a variety of default development systems with their respective characteristics as logics that respond to different strategic contexts. These are considered bases to the design of a development system, and subsequent development of human resource policy and practices.

Key words: leadership, leadership development system, leadership development architecture, stratified systems theory, strategy logic, purpose, sense-making, learning capacity, learning logic, authenticity.

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## **GLOSSARY**

GT	Grounded Theory
HRD	Human Resource Development
HRM	Human Resource Management
IPPM	Department of Industrial Psychology and People Management
UJ	University of Johannesburg





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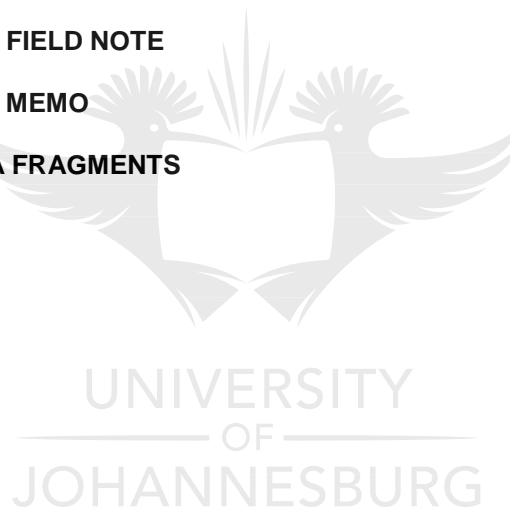
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## CHAPTER 1

### CONTEXTUALISATION

#### 1.1 INTRODUCTION

Legend has it that Winston Churchill said in reply to a comment that he was “disgustingly drunk,”: “Yes, but by tomorrow I shall be sober, and you will still be disgustingly ugly” (Churchill, nd.).

Whether leadership development in organisations is likely to remain “disgustingly ugly” is a subjective assessment, but it may provide a sobering experience if deeply seated, fundamental timeless frameworks are adopted. It is well-reported that fundamental frameworks in strategic human resource management and leadership development are absent (Olivares, 2008; Day, 2001; Weiss & Molinaro, 2005; Ulrich & Smallwood, 2007; Van der Merwe & Verwey, 2012; Reichwald, Siebert & Moslein, 2005; Wright & McMahan, 1993; Wright & Gardner, 2000; Fleetwood & Hesketh, 2008; Becker & Huselid, 2010; Savaneviciene & Stankeviciute, 2010; Buller & McEvoy, 2012; Coetzer, & Sitlington, 2012). Clearly, the absence of conceptual frameworks presents a risk to organisational practices, often referred to as “best practice.”

The landscape in terms of leadership and its development is variable in theory and practice (Brooks, 2015). At the same time an argument exists that too narrow a focus has been adopted in studying leadership (Avolio, 2007). This variability is illustrated in various timeless perspectives and levels to leadership. Stoghill (1974, pp. 7-16) points at the range of perspectives including; leadership as group processes; personality and its effects; the art of inducing compliance; the exercise of influence; act or behaviour; form of persuasion; instrument of goal achievement; effect of interaction; differentiated role and leadership as the initiation of structure. Regarding levels of analysis, Yukl (1998) suggests a four-level framework, namely, leadership as an intra-individual process; a dyadic process; a group process and leadership as an organisational process.

Regarding the variability of development of leadership approaches scholarly views

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also vary. Day (2001) refers to knowledge, skills and abilities being regarded as requirements of individual leadership roles, while Van Velsor and McCauley (2004, p. 22) see the development of leadership "...as the expansion of the organisation's capacity to enact the basic leadership tasks needed for collective work: setting direction, creating alignment, and maintaining commitment..." Olivares (2008) holds the view that leadership development entails developing collective capacity but emphasises it as being an intentional, forward-looking effort to improve human and goal-directed relationships. Similarly, Matlay (2000) stresses the forward-looking posture to improve collective capability and that employees at various organisational levels need to continually learn new and different ways of responding to competitive demands.

Another view of leadership adding to the variability in the field is that leadership entails an organisational system (Hall, 1988). According to Hall (1988) leadership involves a system within the larger organisation; one that transcends different leadership styles (Covelli & Mason, 2017). Osborn, Hunt and Jauch (2002) points out that many contextual approaches of leadership, typically referred to as systems or macro-approaches, consider leadership within a stable bureaucratic context. Finally, there is the view that organisations as complex dynamic systems are challenged by the need to adapt to changing environments whilst maintaining efficient operations (Hazy, 2006; Van der Merwe et al., 2012; Watkins, Earnhardt, Piitenger, Roberts, Rietsema & Cosman-Ross, 2017). In addition to the diversity of leadership and its development there is criticism that the focus adopted is too narrow (see, Avolio, 2007).

In light of the aforementioned, I am convinced that it is necessary to explore architecture for organisational leadership development. More particularly, I believe that a conceptual framework with logic in relationships between the various components or considerations to an organisational leadership development system should be constructed. Particularly important here is developing organisational leadership that goes "beyond the current" leadership capacity. This is believed necessary to implement organisational strategy in context of demands of a kind that are different from their strategic environment.

I consider strategic human resource management a disciplinary basis to leadership

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development. The notion of strategic human resource management has, as with the case of variability to leadership development, changed in time. Human resource management has traditionally been associated predominantly with operational tasks removed from core considerations of senior managers (Bach, 2001). Lawler III and Mohran (2003) argue that the Human Resource Management function is not optimal in the development of human capital in implementing organisational strategy (Bal, Bozkurt & Ertemsir, 2013). In explaining the Human Resource Management performance linkage, Savaneviciene and Stankeviciute (2010) argue that a gap exists owing to a lack of understanding variables and their effect on Human Resource Management. In the same light, Buller and McEvoy (2012) believe that the ways in which Human Resource practices affect organisational performance are still not clear, even though empirical studies point to a positive link.

The notion of Strategic Human Resource Management emerged with the focus on illustrating the strategic value that Human Resource Management can provide, and be acted upon. According to Huselid, Jackson and Schuler (1997), early definitions of Strategic Human Resource Management emphasised the design and implementation of policies and practices to focus human capital to contribute to the realisation of business objectives. Becker and Huselid (2006) saw the strategic logic between an organisation's Human Resource Management architecture and performance as the main Strategic Human Resource Management challenge, with its aim being to support the organisation in achieving its strategic objectives.

Wright and McMahan (1993) believed that strong theoretical models were required to grasp the role of Human Resource Management. They differentiate between Human Resource Management and Strategic Human Resource Management by theoretical models that would allow for prediction and understanding of Human Resource practices and organisational functioning. They also pointed out the absence of a theoretical platform from which to consider Strategic Human Resource Management. Although Strategic Human Resource Management theories provided clarification of some determinants and consequences to Human Resource practices, these theories had little value when seeking to gauge their impact on organisation performance. According to Wright and Gardner (2000), the majority of these frameworks provide macro-level orientations with a rationale for reasons why some Human Resource

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practices are likely to exist. However, they do not provide mechanisms of ways in which Human Resource practices impact on organisational performance. Becker and Huselid (2010) point out that even though empirical work shows direct positive relationships between high-performance Human Resource systems and organisational performance, the challenge between empirical models and their underlying theory remains the weak link. Positive relationships by means of empirical relationship, even though indicated, remain under-theorised and unexplained (Fleetwood & Hesketh, 2008).

At this point, it should be clear that the notion of Strategic Human Resource Management has shifted from the design of consistent policies and practices to the design of models or frameworks providing insight into ways in which practices impact organisational performance. In this regard, Buller and McEvoy (2012), believe there is a need for multi- or cross-level models in Human Resource Management that study relationships between context, Human Resource Management practices, behaviours and performance outcomes.

### **1.2 PROBLEM STATEMENT**

Leaders at various levels continually need to learn new and often different ways of acting (Matlay, 2000; Day, 2001) so that the leadership system can effectively integrate social and technical sub-systems (Hall, 1988) in response to strategic demands. It is within this light that the system to the development of leadership has to be intentional and not limited to requirements of the day, but be future-oriented (Day, 2001; Olivares, 2008; Brown, 2010).

It is noteworthy that the landscape to leadership and its development is variable in theory and practice. The landscape is characterised by diverse levels of analysis, perspectives to leadership, and approaches to leader and leadership development (Yukl, 1998; Van Velsor & McCauley, 2004; Olivares, 2008; Day, 2001). In light of this diverse landscape, the argument is raised that practices to develop leadership may be implemented in a fragmented fashion, and thereby possibly reducing the potential value of development (Weiss & Molinaro, 2005). Notwithstanding this variability, Avolio (2007) unexpectedly, expresses caution that leadership studies may risk having too narrow a focus. I believe fragmentation in leadership and leadership development has

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left a gap with regard to organisational contextual aspects affecting intentional and future-oriented development of leadership.

It is also my believe that it is necessary to examine organisational contextual considerations to leadership development systems that affect the intentional and future-oriented development of leadership. Understanding such concerns would potentially enable the construction of architecture for leadership development capacity as a theoretical frame. Such a framework of considerations with associated choices should contribute to the design and function of an intentional and future-oriented leadership development system.

Thus, the drive with the thesis is to examine organisational contextual considerations regarding the design of a leadership development system that affect the intentional and future-oriented development of leadership. Understanding such concerns would potentially enable the construction of architecture for leadership development capacity. Such a framework of elements with associated choices would, in turn, contribute to the design and function of an intentional and future-oriented leadership development system.

### **1.3 RESEARCH PURPOSE**

The intent with this grounded theory study was to examine perceptions of leaders in management and leadership development to create an organisational leadership development architecture. This architecture promises to be a fundamental theoretical framework to the design of intentional and future-oriented leadership development systems.

Associated research aims with this study are

- Identifying and reporting on considerations to the design of an intentional and future-oriented leadership development systems, from field data;
- Differentiating considerations to the design of leadership development systems into a frame of interrelation; and
- Constructing a series of considerations and logic to its effect on the design of a system for the development of organisational leadership.



## **1.4 RESEARCH QUESTIONS**

The following research questions are posed to achieve the research purpose:

- What are the considerations to the design of intentional and future-oriented leadership development systems from the participants' perceptions?
- How do considerations to the design of leadership systems differentiate into a frame of interrelation?
- How does a series of considerations form different logics that affect the design of a system for the development of organisational leadership?

## **1.5 ANTICIPATED CONTRIBUTIONS OF THE STUDY**

The value of the research resides with its anticipated contribution to strategic human resource management and particularly in uncovering a series of considerations, unique to the participants, to the design of a system for the development of organisational leadership. In addition, the study promises to present, with insights gained from the mentioned considerations, different logics in contemplation of system design. Variants in development systems that derive from the considerations and associated logics are likely to be more appropriate to distinct organisational options in strategy intent. The considerations to the design of a system for the development of organisational leadership, different logics thereto, and associated variants in development systems promise to present a unique theoretical frame as organisational leadership development architecture.

A further contribution of this study is its interpretation of the metaphor of architecture used in human resource management or development. Architecture, as explained in section 1.6.4, comprises a series of considerations and associated logic, that form a base, or deep-seated framework in design of development systems. Architecture with this view provides a foundation for understanding the design from where human resource development practitioners can assimilate their respective human resource philosophies, policies and practices into a development system. I view architecture, in this light, as locus of value as it guides system design or the transformation of existing systems in the light of organisational strategic environment. It represents a quality that considers the organisation's strategy and elements thereto to provide logic to a development system design.

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This study, other than the already mentioned contributions, makes use of Stratified Systems Theory as a, heuristic, theoretical frame. My view to Stratified Systems Theory is provided in section 1.6.5. However, the study does promise to bring about a application of Stratified Systems Theory that is different from applications in job and organisational design. Stratified Systems Theory is to be applied as a design element to variants in development systems, and not conventionally as a design frame to jobs or organisations.

Having introduced the study, offered its problem statement and research purpose, and having presented the research questions and anticipated contributions, I now clarify the key approaches I used in the study.

### **1.6 KEY APPROACHES USED IN THE STUDY**

The following comprise the key approaches that are central to the study:

#### **1.6.1 Leaders, Leadership and their Development**

Day (2001) argues that organisations should pay attention to individual leader development as well as leadership development, as these provide leadership capacity for sustained organisational performance (Kazmi & Naaranoja, 2015). Olivares (2008) adds that while leader development is important, it is not equal to leadership development or sufficient without the latter. Leader development focuses on knowledge, skills and abilities that are thought to be essential of individuals in leadership roles (Day, 2001). In contrast, leadership development, in the view of Van Velsor and McCauley (2004, p. 22), "...is the expansion of the organisation's capacity to enact the basic leadership tasks needed for collective work: setting direction, creating alignment, and maintaining commitment."

Olivares (2008) highlights leadership development as the development of a collective capacity that is intentional, and a forward-looking process to improve human and goal-directed relationships. Similar emphasis is placed on the forward-looking posture for improving the collective capability by Matlay (2000). He (Matlay, 2000) argues, considering that tacit knowledge is key to strategic advantage, that employees at various levels in organisations need to continually learn new and different ways of

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reacting to competitive demands (Watkins, Earnhardt, Piitenger, Roberts, Rietsema & Cosman-Ross, 2017; Lavine, 2014). In addition, such organisational attributes demand integrative and intentional learning at individual, group and system levels (Karhu, 2017) in order to add individual, team and organisational value to competitive strategies (Matlay, 2000).

Day (2001) found that leadership development placed stronger focus on expanding the collective capacity of the organisation in the leadership role and process. The leadership role includes people who are not in designated leadership positions, but involves processes that enable groups to work together meaningfully towards greater organisational capacity in addressing future, unforeseen challenges effectively (Young, 2018). Olivares (2008) and Brown (2010) have a similar view of capacity in addressing unforeseen challenges effectively.

Concerning practices of developing leaders, Weiss and Molinaro (2005) highlight an integrated approach, arguing that leadership development traditionally relies on two approaches, namely the single-solution, and the multi-solution approaches. They state that over-reliance on the classroom as the primary method of developing leaders and on generic leadership models are typically weaknesses of the above. Weaknesses in the multi-solution approach include the implementation of various options for development or practices in a fragmented fashion which reduces potential value. This weakness, according to the authors (Weiss & Molinaro 2005), is an outcome lacking an overall development strategy interlinking various practices and with organisational strategy.

Literature point to differences to leader and leadership development (Olivares, 2008; Day, 2001; Van Velsor & McCauley, 2004). Both concepts are, however, mutually important for the development of leadership capacity within an organisation (Olivares, 2008; Day, 2001). Also, it is, apparent that the development of leadership should be intentional and not limited to requirements of the day, namely, future-oriented (Day, 2001; Olivares, 2008; Brown, 2010, Jakubik & Berazhny, 2017). It is noted that development or practices may be implemented in a fragmented fashion thereby reducing the potential value, and that an overall development strategy interlinking various practices with each other and with organisational strategy is required (Weiss

& Molinaro, 2005).

### **1.6.2 Macro-approach to Leadership**

Yukl (1998) puts forward four levels of analysis that relates to leadership research, namely; (a) an intra-individual process, (b) a dyadic process, (c) a group process, and (d) an organisational process. I adopted an organisational or macro-level of analysis, which implies the consideration of leadership as a system (Yammarino, Dionne, Chun & Dansereau, 2005; Osborn et al., 2002; Buller & McEvoy, 2012). This level of analysis implies considering leadership as a process within an open leadership system where the other typical levels of analysis are considered sub-systems (Yukl, 1998). Systems approaches to leadership is also referred to as contextual or macro-approaches (Osborn et al., 2002).

Hall (1988) promotes leadership as an integrative system linking social and technical sub-systems with leader-imposed policy. The “system management” necessary to integrate social and technical sub-systems is, however, not static within a dynamic world context as the organisational system needs to adapt to changing environments whilst maintaining efficient operations (Hazy, 2006). This demand is placed in perspective by Kaplan and Norton (2004) who consider that organisational strategy balances contradictory forces and presents simultaneous and complementary themes. According to Hazy (2006), leadership is required to bring about and maintain the organisation as a unified system even though changing tensions exist within the environment or within components of it. Hall (1988) argues that this view of leadership as a system transcends different leadership styles.

### **1.6.3 Strategic Human Resource Management**

Nearly three decades ago Wright and McMahan (1993) noted that the concept of strategic management had become of interest with attention to integrate human resource management with strategic management. Persisted over time, the strategic importance of people together with the requirement for interfacing between strategy and human resource management issues are acknowledged (Sheikh, 2018). Early definitions of strategic human resource management highlight a consensus. Huselid, Jackson and Schuler (1997, p. 171) argue that strategic approaches to human

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resource management entail the design and implementation of organisational internal policies and practices that drive human capital contribution to business objectives. Lepak and Snell (2002, p. 517) indicate that research in strategic human resource management has facilitated a shift in attention to organisational-wide matters as they relate to people management.

Wright and McMahan (1993), argue that there is a lack in theoretical models to the role of human resource management and determinants to its practices. The authors argue that strategic human resource management theory need to put emphasis on determinants of human resource practices. At times, misalignment happens where Human Resource Management functional strategies were developed on “best practice” instead of an integrated whole in support of business needs (Matthewman & Matigon, 2013). Wright and McMahan (1993), add that the key determinant to Human Resource Management practices is strategic intent as it allows for proactive decision-making. They further state that various theories ignore business strategy as a determinant of HR practices.

Approaches to Human Resource Management emphasise a drive towards a more strategic approach to the management of people. Lawler III and Mohran (2003) argue that the Human Resource Management function can make more significant contributions to the development of human capital in support of effective contributions to the implementation of the organisational strategy. Doubt do however remains, according to Lawler III and Mohran (2003), to the capabilities of Human Resource Management functions to single out and ring about changes required in support of new capabilities businesses need (Lawler III & Mohran, 2003, p. 4). Becker and Huselid (2006) suggest that emphasis be placed on strategy implementation as intervening construct to Strategic Human Resource Management. This proposition is based on their view that the challenge faced by Strategic Human Resource Management lies in the strategic logic between organisation’s Human Resource Management architecture and performance. They suggest that the strategic logic between organisation’s strategy, Human Resource Management architecture and its subsequent performance should be emphasised.

Thus, over time, consistent emphasis has been placed on the linkage between human

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resource management practices and organisation strategy; the need for congruency in human resource practices and the initiation of change (strategic human resource management implementation) so that necessary capabilities for enacting the strategy could be maintained or developed. The aforementioned resonates with the definition of Strategic Human Resource Management by the SA Board for People Practices as “a systematic approach to developing and implementing long-term Human Resource Management strategies, policies and plans that enable the organisation to achieve its objectives” (SABPP, 2013, p. 2).

### **1.6.4 Architecture in Human Resource Management**

The metaphor of architecture is employed within the Human Resource Management to point out the locus of value creation (Becker & Huselid, 2006). The system of human resource management policies and practices is typically referred to as Human Resource Management Architecture (Becker, Huselid & Beatty, 2009). Swanepoel, Erasmus, Schenk and Tshilongamulenzhe (2014) describe human resource management architecture as the design, development and use of the human resource management sub-system. This includes human resource management strategies, policies, systems, practices and processes. Becker and Huselid (2003) define human resource management architecture as the systems, practices, competencies together with employee performance behaviours that frame strategic human capital within an organisation.

Schuler (1994), who considered human resource management integration and coherence in light of the strategic needs of an organisation, provides a framework that seeks to integrate human resource management activities with organisational strategy and strategy intent. Schuler's framework points to Human Resource Management philosophy, policies, programmes, practices and processes that can be considered strategic through their links with the strategic needs of the organisation. Becker and Huselid (2006) argue that human resource management architecture is not limited to systems and practices that lead to a supply of competent and motivated employees, but should specifically include the performance behaviour required by human resources for implementing the organisational strategy which reflects the strategic value of human resources. According to Becker and Huselid (2006) it is therefore



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required that human resource management architecture and the strategic choice made by the organisation matched. They highlight the unique strategic quality of human resource management architecture in its rendering strategic value for creating human capital for strategy implementation (Ungerer, Ungerer & Herholdt, 2016). They, Becker and Huselid (2006) continue by arguing that strategic choice may not bring about uniqueness with human resource management architecture. They suggest alignment and differentiation of architecture with strategic capabilities of the organisation. The principle of alignment is similar to the notion of Schuler's (1994) integration and coherence, as a system integrated with organisational strategy.

From the preceding it should be clear that architecture serves as a metaphor for design consisting of various elements; strategies, policies, systems that, when integrated, support a desired outcome, for example behaviour required by human resources for implementing organisational strategy. Outcome presents the value of the architecture. I thus consider the layered elements to the human resource development system human resources strategies, policies, functions, practices and processes as examples of elements of the human resource development system. In agreement with Weiss and Molinaro's (2005) argument concerning practices in leadership development, I believe caution is appropriate and that architecture elements should not be considered as endogenous and fragmented best practices. Rather an architectural logic with regard to design incorporating various elements should be followed.

The architecture metaphor is employed beyond the human resource management system. Sanchez (2012), from an organisation design perspective, considers architecture to be more than pointing to essential elements of a system. Architecture, according to Sanchez, clarifies ways in which variations to the system design affect the functioning of the system. Sanchez also indicates that variation to design enables system alignment with strategic environment through the choices the architecture presents. Architecture is thus not merely a typology of elements to a system, but illustrates alternatives, and its affect to the system. It brings about the outcome, in this case, as alignment with strategically important characteristics of its environment. A similar contextually bound view to architecture is highlighted by De Rue and Myers (2014, p. 836) in their reference to architecture in leadership development as "the features of the organisational context that are designed to facilitate and support

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leadership development.”

In light of the views presented above, I consider architecture as a framework of elements with associated choices, or variations in light of organisational context affecting the design and function of the development system as a whole. These considerations support an architectural logic to the development system design in light of the desired system outcome. Also, in line with the key concepts presented, I believe organisational leadership development architecture entails a framework of elements with associated choices, or variations in light of the organisational context, affecting the design and function of an intentional and future-oriented leadership development system.

### 1.6.5 Stratified Systems Theory

Jaques (1985) explains Stratified Systems Theory as a “comprehensive system” that integrates organisational structure, individual capability and the rendering of that capability into a framework. Jaques reports that employment hierarchies are typically structured in separate inter-related levels or strata of management and their functions. Strata are differentiated by the time span of level of work responsibility, where time span presents the maximum time for completion of the longest tasks (Jaques, 1985). Work is defined as an “Exercise of discretion within limits to achieve an objective within the maximum target completion time” (Jaques, 1985, p. 234). The core of work is “the exercise of discretion” (Jaques & Stamp, 1990, p. A-6). Organisational policies, procedures, controls, signals and other controls provide boundaries as “the scope of the discretionary environment.” The element of discretion relates to the process of decision-making among a number of possible courses of action that are likely to lead to goal achievement (Jaques & Stamp, 1990, p. A-6). McMorland (2005) indicates that the approach to locate responsibility to time spans of discretion and intention as foundation to the definition of managerial work, take the definition of management work away from the properties of individuals.

Jaques (1985, p. 235) presents seven levels, or strata, namely: Stratum I, with cognitive state of hands on direct work with things and people in task execution, entailing shaping things; Stratum II, with cognitive state that defines direct work, implying planning and controlling aggregates of tasks; Stratum III, with cognitive state



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extrapolating functional system trends and balances current and future requirements; Stratum IV, with cognitive state that transforms operating systems and shifts from direct command; Stratum V, with cognitive state shaping complex systems; Stratum VI, with cognitive state overseeing complex systems and defining their relations with the environment, and Stratum VII, with cognitive state that creates complex systems and organises major resources based on the extrapolation of system needs.

Jacques' strata provide an integrated perspective of responsibility and complexity at respective levels (Kinston & Rowbottom, 1989; McMorland, 2005). Time horizon refers to "holding together of intention over time" (McMorland, 2005). As the time horizon increases the required output becomes more complex (Kinston & Rowbottom, 1989). Also, Jacques's theory provides a basis for levels of decision-making complexity each with its unique theme and different time horizon, and describes distinctive contributions or value-add of each level (Grobler, 2005). Finally, the theory provides a framework for differentiating activities, with Jacques (1985) arguing it presents a hierarchy of work typically structured in separate levels of management and function.

Stratified Systems Theory offers a framework for the required leadership capacities and different strata. The value of implementing Stratified Systems Theory lies in its capability to differentiate between work levels in terms of discretion/intention. However, the theory is neither applied to individual managers' work or practice or the optimisation of a system (human resources system layered with various layer elements) in this study. Rather, it is employed as an organising framework in this study to frame the examination or considerations to leadership development systems.

I believe it necessary, having outlined key approaches to the study, to provide background about myself. Amongst various qualitative researchers Bloomberg and Volpe (2008) point to the importance to provide context to the researcher and what he brings to the project. Therefore, I next, outline my interest and positions.

### **1.7 THE RESEARCHER**

I started my career as an officer in the South African Navy where I held various appointments relating to management and leadership development. Subsequently, I held positions in other spheres of public service where my respective responsibilities ranged from management and leadership development, to organisational learning and

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development. Currently, my responsibility is to develop management and leadership capacity across various public institutions. Overall I have 25 years' experience in human resource development, including management and leadership development.

My interest in the research topic arose from my leadership role in management and leadership development, and my interaction with multiple clients and service providers. These services provided ranges across private and public higher education institutions, a variety of training institutions, and various consulting organisations. My interactions with clients and service providers have generally been across learning and development strategy, programme design and development, and/or development practices.

I have developed the view in time, making use of an analogy with a construction architect, that there is very little to fundamentally – like physics in the case for the construction architect – assist in bringing together diverse role players in leadership development practice. The role of unifier lies with the agent or learning architect. This architect has to discern between sales pitches and unique value offerings that differentiate the one from the other, in light the need for leadership development.

There is in my mind, a requirement for fundamentals like the laws of physics in the field of leadership development. Deep-seated frameworks are required amongst the abundance of theory and practice. I considered such deep-seated frameworks in light of what Hall (1988) argues about leadership systems. Deep-seated or fundamental frameworks present timeless development system logics that transcend different styles, theory, practice, sales pitch or unique value offerings that differentiate one potential service provider from another.

Next, let's turn to the structure of the thesis.

### **1.8 THE STRUCTURE OF THE THESIS**

Chapter 1 presents an introduction, background, problem statement, research question, and clarification of key concepts. Chapter 2 outlines the approach and methodology used in the research.

The research findings are explored in Chapter 3. In line with grounded theory's open

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coding extant literature assisting in the development of categories and their relationships are also presented here. Chapter 4, axial coding, in accordance with grounded theory, presents the analysis of thematic categories focusing on the assimilating of themes towards conceptual wholeness.

Chapter 5 presents the integration of conceptual categories into a theoretical framework. I introduce a Strata Frame as heuristic concept delineating the utilisation of Stratified Systems Theory in the study.

My research story or personal experiences of the doctoral journey is offered in Chapter 6. The thesis is concluded with Chapter 7, entitled: Summary, Conclusion, and Recommendations.

### 1.9 EDITORIAL PRACTICES

I believe it appropriate to provide a brief guide of my editorial practices. I highlight my use of ellipses, text in bold type, and text in italic type.

- I use ellipse in quotations where I omit part of the quotation that I consider not directly relevant to the point being made. I use this practice for clarity purposes.
- I use italics when presenting a title of a book or journal.
- I use bold type within body text to present emphasis. I also use of bold type with headings.
- I make use of indented margins together with italics for longer quotes, more specially quoting the voices of participants.

### 1.10 SUMMARY

The research purpose and questions of the study are introduced in this chapter. Firstly, I provide an introduction that led to problem statements, a research purpose and questions. Secondly, anticipated contributions by the study is highlighted before, thirdly, key approaches from extant literature are introduced. An overview of the researcher is provided, with lastly, descriptions of the structure of the thesis and editorial practices adopted.

## CHAPTER 2

### RESEARCH APPROACH AND METHODOLOGY

#### 2.1 INTRODUCTION

I outline the approach and methodology adopted for the study in this Chapter. More particularly, I (a) indicate why I opted for a qualitative research approach; (b) outline its key features; (c) state my key philosophical positions; (d) locate my position as to the role of literature and theory and outline how I adhered to ethics; (e) I describe the research strategy I selected, and finally, outline the key decision-taking steps taken during the research process.

#### 2.2 QUALITATIVE RESEARCH AS RESEARCH APPROACH

I adopt, in light of the purpose of the study, a qualitative research approach. I therefore make use of insights gained from people's experiences and perceptions to leadership development in real-world conditions (Yin, 2011, p. 8). Humphrey (2014), amongst others, point out that a qualitative approach captures the richness of people's perceptions and experiences. Brynard and Hanekom (1997, p. 29) point to the intent of qualitative research to discover "novel or unanticipated findings" of participants' perspectives. Heppner and Heppner (2004), and Bless and Higson-Smith (1995) add that qualitative research provides a way of capturing their experiences and views in a specific context.

Furthermore, my choice of qualitative research is aligned to management research. In the *Sage Handbook of Qualitative Business and Management Research Methods*, and in particular *Methods and Challenges* of Cassell, Cunliffe and Grandy's (2019), the authors point out that qualitative research is well-established within the business and management field; see for example, entrepreneurship (Díaz García & Welter, 2011; Rauch, van Doorn & Hulsink, 2014; Le Roux, 2016); human resource management (Ridder & Hoon, 2009); organisational behaviour (Cassell & Symon, 2004; O'Leary & Sandberg, 2016; Symon & Cassell, 2012); and strategy (Hoskisson, Hitt, Wan & You, 1999; Bettis et al., 2014; Knight, Daymond, & Paroutis, 2020).

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Qualitative research has received extensive attention amongst its exponents during the past decades, and it is difficult to offer a succinct definition for it (see, for example, Schurink, 2009; Yin, 2011). Focusing on the use of qualitative research in various disciplines, Yin (2011, p. 6) cautions: “Too brief a definition will seem to exclude one discipline or another. Too broad a definition will seem uselessly global...Within its own particular discipline or profession each term connotes a large body of research, embracing a variety of contrasting methods.”

Nonetheless, it is necessary to appreciate the nature of qualitative research to grasp it as a different research style. However, to stipulate what qualitative research is and is not, is not straightforward (Bryman 2012, p. 380) since different writers emphasise different characteristics. In addition, there is uneasiness among certain authors to specify the nature of qualitative research (Bryman, 2012, p. 383). Despite these challenges, I believe it is sensible to follow the tendency amongst writers (Creswell, 2007, p. 38; Yin 2011, pp. 7-8; Merriam & Tisdell 2016, p.6; Taylor, Bogdan & DeVault, 2016, pp. 7-11), to focus on common, overlapping features found in the qualitative inquiry literature.

Yin (2011, pp. 7-8) offers the following features of qualitative research:

- Studying the meaning of people's lives, under real-world conditions;
- Representing the views and perspectives of ... **participants**;
- Covering the contextual conditions within which people live;
- Contributing insights into existing or emerging concepts that may help to **explain human social behaviour**; and
- Striving to use **multiple sources of evidence** rather than relying on a single source alone (emphasis in the original).

Taylor, Bogdan and DeVault (2016, pp. 7-11) emphasise that descriptive data is produced by qualitative research, and offer eight foci thereof. These are:

- Studying the meaning people attach to things in their lives;
- Utilising inductive and flexible research designs;
- Viewing settings and people holistically;
- Studying social phenomena; people, settings, or groups holistically and in the

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context of their pasts; social reality is not reduced to variables;

- Employing strategies that are appropriate to study people's daily lives; that is, naturalistic research;
- Valuing all perspectives in research; that is, experiences and viewpoints of people from all walks of life including the powerful and powerless are investigated;
- Learning something by studying any setting and group. "No aspect of social life is too mundane or trivial to be studied. All settings and people are at once similar and unique. They are similar in the sense that some general social processes may be found in any setting or among any group of people. They are unique in that some aspect of social life can best be studied in each setting or through each informant because there it is best illuminated (Hughes, 1958, p. 49)", and
- Flexibility in design and research execution implies researchers being crafts persons.

Two related features of qualitative research indicated by many writers are the researcher as primary instrument (Creswell, 2007, p. 38; Merriam & Tisdell, 2016, p.16) and (self) reflexivity (Tracy, 2013, pp. 2-3; Eriksson & Kovalainen, 2016, p. 13).

*The researcher's ontology, epistemology and chosen methodology and theory are instrumental to qualitative inquiry. He or she may be regarded as a "gendered, multi-culturally situated researcher (who) approaches the world with a set of ideas, a framework (theory, ontology) that specifies a set of questions (epistemology), which are then examined (methodology, analysis) in specific ways" (Denzin & Lincoln, 2018b, p. 52).*

By observing human behaviour, interviewing participants and studying documents, qualitative researchers collect data themselves. While they may use a protocol they do not rely on instruments like questionnaires (Creswell, 2007, p. 38). Being able to immediately react and adapt to reality and people's perspectives, qualitative researchers personify the human instrument, which is regarded ideal to collect and analyse data. In addition, by applying non-verbal and verbal communication,

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qualitative researchers can expand their understanding, summarise material, check out with participants their interpretation, and delve into unanticipated reactions (Merriam & Tisdell, 2016, p. 16).

However, qualitative researchers' points of view, their past experiences and roles influence both the research setting and their interactions with research participants.

*Rather than trying to eliminate these biases or “subjectivities,” it is important to identify them and monitor them in relation to the theoretical framework and in light of the researcher’s own interests, to make clear how they may be shaping the collection and interpretation of data (Merriam & Tisdell, 2016, p.16).*

One needs to take stock of your own knowledge and views that may shape “your role as research instrument” (Yin 2011, p. 69).

*Inevitably, and as a direct function of having chosen a topic of interest to you, some background factors will exist. Typically, people tend to bring sympathetic, antagonistic, or overtly naive views to their topics of interest. Any such orientations can affect a study lines of inquiry and hence the potential findings from the study. You would be fooling yourself if you think that you bring a totally neutral or objective stance to your study (Yin, 2011, p. 69).*

Eriksson and Kovalainen (2016, p. 13) add:

*In practice, this usually means that you **reflect** on how you produce knowledge as a researcher, what kind of knowledge it is, and how you can relate this new knowledge to other knowledge you might already have. This **everyday reflection** is a way to think through your research project throughout the entire process (emphasis added).*



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Another characteristic of qualitative research is the emphasis placed upon process. Bryman (2012, p. 402) writes:

*Qualitative research tends to view social life in terms of processes. This tendency reveals itself in a number of different ways. One of the main ways is that there is often a concern to show how events and patterns unfold over time. As a result, qualitative evidence often conveys a strong sense of change and flux.*

A final characteristic is its philosophical foundations (Merriam & Tisdell 2016, p. 8; Pernecky 2016; Eriksson & Kovalainen 2016, p. 13).

*Qualitative research approaches can be related to the philosophy of social sciences in differing ways. Most research approaches are not related to one specific tradition of the philosophy of science. This means that methods can be used within several philosophical traditions (Eriksson & Kovalainen, 2008, p. 12).*

I conclude this overview of what qualitative research typically comprises, with the following summary offered by Rossman and Rallis (2017, pp. 12 of 26):

*A qualitative research project takes place in the field; relies on **multiple methods for gathering data**; and calls on you to be pragmatic, flexible, politically aware, ethical, and self-reflective. **Fundamentally interpretive** and emergent, qualitative research is systematic inquiry that is characterized by a stance of openness, curiosity, and respect. On the practical side, qualitative research is **labor-intensive, time-consuming, frustrating, and challenging**. There are no formulaic rules to follow, only guiding principles gleaned from direct experience, including reading the literature, studying with others, and the actual doing. Moreover, many find it exhilarating and deeply moving, and it can change your worldview (emphasis added).*

Provided the multi-faceted nature of qualitative research, it is crucial that when embarking on qualitative research one considers its underpinning research



philosophy.

*In order to gain a good understanding of what you can do with methods in your research, you should at least be somewhat familiar with the basic philosophical concepts, positions and traditions (Ericksson & Kovalainen, 2016; pp.11-12).*

I continue to consider fundamental philosophical concepts as well as my position regarding these in the study.

## **2.3 RESEARCH PHILOSOPHY**

Ontology, epistemology and methodology are arguably the most fundamental concepts in the philosophy of social sciences, and are collectively regarded by many writers as comprising a paradigm (Burrell & Morgan, 1979; Guba & Lincoln, 1994; Tracy, 2013; Ericksson & Kovalainen, 2016). Paradigms entail preferred ways of understanding social reality, collecting information about the social world and creating knowledge. Since we all have different positions on these matters, it is essential that when undertaking qualitative research we familiarise ourselves with the key arguments and viewpoints representing paradigms (Tracy, 2013).

### **2.3.1 Ontology**

Ontology, in the view of Nieuwenhuis (2007, p. 53), is “the study of the nature and form of reality (that which is known or can be known).” More specifically, as Eriksson and Kovalainen (2008, p. 13) state:

*Ontology concerns the ideas about the existence of and relationship between people, society and the world in general...Ontological assumptions embrace all theories and methodological positions... This means that it is based upon perceptions and experiences that may be different for each person, and change over time and **context** (emphasis in the original).*

Particularly important, as Eriksson and Kovalainen (2008) stated, is the division between objectivism and subjectivism when considering reality. Bryman and Bell

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(2007) point out that social phenomena and their meanings are independent of people, exist as external facts beyond their control from an objectivist perspective, whereas, a constructivist point of view “asserts that social phenomena and their meanings are continually being accomplished by social actors” (p. 726).

Ontologically, my position in the study was that all perceptions are constructed, and that it is not possible to separate ourselves from what we perceive as real, namely, what we are, our identity and the meanings we attach to our social settings.

### 2.3.2 Epistemology

Epistemology relates to “how things can be known – how truths or facts or physical laws...can be discovered and disclosed” (Nieuwenhuis, 2007, p. 55). Thus, reality can be known through constructed realities of research participants, based on mental models shaped through social formation of “facts.”

My epistemological position in the study is interpretivist. That is, I attempted to unravel the managers’ experiences and perceptions to considerations in management and leadership development that may surface an architecture therein.

The implication is that observable data is collected within specific social settings which need to be examined in terms of their dynamic contexts so that the emerging reality is likely and as close as possible to these settings (Wahyuni, 2012; Guba & Lincoln, 1994). Epistemologically, this implies the researcher being part of the research process and not an objective observer (Mills, Bonner & Francis, 2006). This position is known as the interpretivist tradition:

*...used as a synonym for all qualitative inquiry, blurring important distinctions in intellectual traditions. More accurately, the term denotes those approaches to studying social life that accord a central place to **Verstehen** as a method of the human sciences, that assume that the meaning of human action is inherent in that action, and that the task of the inquirer is to unearth that meaning (Schwandt, 2007, p. 160) (emphasis in original).*

Having indicated where I stood ontologically and epistemologically, I next clarify my

stance in terms of three key matters when conducting qualitative research.

## **2.4 KEY ISSUES**

In any qualitative study you need to consider when and how you will be interacting with (a) existing literature; (b) what your position will be regarding theory, and to convert research to theory, and (c) how you will be ensuring ethical research.

### **2.4.1 Using the Literature**

Review of contemporary qualitative inquiry literature is certain to reveal the place and role of literature in this research approach as characterised by debate and controversy. Shank (2006, p. 117), in light of the afore-mentioned, distinguishes approaches: ignorance-is-bliss and literature-is-valued. The first holds that when collecting data, one must be careful that data does not become contaminated, and that one therefore stays clear from subjective preferences and avoid imposing meanings on data. Adherents to the literature-is-valued approach regard reviewing literature related to the research topic prior to data collection as important. The argument is that the more you know about the topic, the better you will design the study. The intention with literature review is not to demonstrate that the proposed research has to answer some question. Moreover, it is not that one has an incorrect understanding of a phenomenon. Instead, our understanding thereof is incomplete (Shank 2006, p. 118).

*Although some contemporary researchers prefer to formulate research problems with reference to existing theory, it is still essential that qualitative researchers remain open to information that comes from the field. The chief advantage of qualitative research lies in its open and flexible character, and an overreliance on theory can easily close off important insights. **Toward the latter stages of your research, you will be ready to return to the literature and to search for additional literature that bears on the developing findings** (Taylor, Bogdan & DeVault, 2016, p. 175) (emphasis added).*

It is thus noteworthy that the use of the literature in qualitative research vary according

to type of design or strategy.

It should be clear that in my grounded theory study (see section 2.5) I align with the literature-is-valued school of thought. Firstly, I undertook a preliminary literature review to demarcate a general idea to the area of study (Jones & Alony, 2011) and to clarify key approaches and concepts used in the study (see Chapter 1). Secondly, I used scholarly concepts and existing research findings when I returned to the literature after having gathered the data to illuminate it (Bitsch, 2005). What I derived from the literature was used cautionary to facilitate the emerging framework (Chiovitti & Piran, 2003). In particular, I used the constructs and findings to expand the relationships between categories (Thornberg, 2012; Mills et al., 2006). Important here is the Strata Frame I derived from the Stratified Systems Theory literature.

#### **2.4.2 Theory**

“(T)heory is an inescapable component of all research, whether or not it is explicitly acknowledged” (Maxwell & Mittapalli, 2008, p. 877). Bryman (2012, p. 5) writes: “...(S)ocial research is informed and influenced by theory. It also contributes to theory because the findings of a study will feed into the stock of knowledge to which the theory relates.” Scholars generally agree that theory is part and parcel of research. However, turning to qualitative research, it is clear that the role and place of theory is far from simple:

*In one sense, we respect the notion of theory as an overarching perspective that helps us coordinate a wide range of findings and understandings. But the scientific role of theory, where theory is used to settle questions of meaning, often impedes genuine qualitative inquiry. This is because the primary focus of qualitative research is, front and centre, an examination and inquiry into meaning (Shank, 2006, pp. 7–8).*

Tavallaei and Talib (2010, p. 570) point out that differing and inconclusive opinions exist regarding the role and position of theory in qualitative research. Anfara and Mertz (2015) state that theory ranges from little or no reference being made, to views of it influencing the research approach and paradigm, and to statements of it being more

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pervasive than simply providing a methodological approach; thus affecting all aspects of the research process.

In terms of the nature of theory, it is necessary to distinguish between grand theories, that is, theories functioning at a high abstract level, and middle-range or miniature ones. These are theories proposing an explanation of behaviour in a particular social setting or situation (Marule, 2017). A related matter here is the broad logics found in social science research.

Good discussions of these models are found in social science research generally (cf. Bryman, 2012) and in qualitative inquiry specifically (Tracy, 2013, p. 22; Eriksson & Kovalainen, 2016). Following qualitative research's inductive feature, researchers typically begin gathering data to build concepts, propositions or theories rather than working deductively to test hypotheses as their quantitative counterparts. Most social science research contains inductive and deductive reasoning (Tracy 2013, p. 22; Eriksson & Kovalainen, 2016, p. 24).

*Some research methods books offer **abduction** as a way to combine deduction and induction in one research project. Abduction refers to the process of moving from the everyday descriptions and meanings given by people, to categories and concepts that create the basis of an understanding or an explanation of the phenomenon described (Eriksson & Kovalainen, 2016, p. 24) (emphasis added).*

Tracy (2013, p. 22) points out that qualitative researchers can employ both approaches, but emphasises that they:

*Tend to be contextual and generally...use inductive, emic approaches to understand local meanings and rules for behavior. At the same time, many researchers will turn to established theoretical models after they have examined their data, to see how emergent findings extend or complicate existing theories. They may also "hold on loosely" to developed models as they enter the analysis of qualitative data, where these models sensitize them to potential meanings.*

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In converting the research findings, which is, the participants' perceptions to theory, and my approach can best be described as abductive and iterative.

### 2.4.3 Adhering to Research Ethics

Qualitative researchers would generally agree that ethics "...are morally bound to conduct ... research in a manner that minimizes potential harm to those involved in the study" (Bloomberg & Volpe, 2008, p. 76). The researcher's relationship to participants causes debate in view of ethics in qualitative research (cf. Preissle, 2008; Merriam & Tisdell, 2016).

*In qualitative studies, ethical dilemmas are likely to emerge with regard to **the collection of data** and in **the dissemination of findings**. Overlaying both these processes is the researcher-participant relationship. For example, this relationship and the research purpose determine how much the researcher reveals about the actual purpose of the study—how informed the consent can actually be—and how much privacy and protection from harm is afforded the participants (Merriam & Tisdell, 2016, p. 261) (emphasis added).*

However, there are additional aspects of research ethics adding to the complexity of research ethics in qualitative research.

*...(Q)ualitative researchers must address the moral implications of their representations to those they study, to their scholarly colleagues, to policymakers, and to the media and the public. These competing interests and the varying moral priorities of researchers themselves mean that the ethical conduct of qualitative research is complex, evolving, and **contingent across the course of a study** and is a matter of continuing debate in the qualitative research community of practice (Preissle, 2008, pp. 5-6 of 8) (emphasis added).*

Since qualitative research is flexible it is important when one does a qualitative study to demonstrate that you conducted it in a trustworthy way and fairly. This is part of



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what Yin (2011) terms research integrity. As Merriam and Tisdell (2016, p. 261) emphasise while various guidelines and codes of ethics are available "...actual ethical practice comes down to the individual researcher's own values and ethics" (Merriam & Tisdell, 2016, p. 261).

Since the study was undertaken under the auspices of the Department of Industrial Psychology and People Management of the University of Johannesburg, I did a careful study of their procedural ethics protocol. With regard to the latter, Thomas (personal communication, 30 January 2014) emphasises meaningful research, that is, methodologically sound research including informed participation, safeguarding the rights of participants, honest and full reporting, and acknowledging scholars' concepts and ideas in the thesis.

Informed consent is fundamental to ethics, that is, "...the principal that seeks to ensure that all human subjects retain autonomy and the ability to judge for themselves what risks are worth taking for the purpose of furthering scientific knowledge" (Bloomberg & Volpe, 2008, p. 76). Marzano (2012, p.443) adds:

*It states the obligation to furnish the potential participants in a research study ... with detailed information (preferably in written form) on the purpose, duration, and methods of the research. Moreover, the risks and benefits deriving from participation in the study and the treatments must be honestly described. And guarantees must be given as to absolute confidentiality and the respondent's right to withdraw his or her consent at any time (Marshall, 2003).*

I drew up an informed consent with the assistance of my study leaders (see Appendix A). In it I; (a) explained the purpose, the research approach and methods to be employed; (b) outlined what I would require in terms of data collection and in particular during the interviews; (c) sketched my researcher role; (d) gave assurance that names would not be used and that any information that might reveal personal identities would be removed from the thesis and any scholarly article based on the study, and (e) emphasised voluntary participation.

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In order to conceal the research participants' identity, I made use of a phonetic alphabet when referring to them in the text and where I offer excerpts from their accounts. Where they referred to persons and organisations I removed or concealed these.

Having covered the study's research approach, I now turn to my ontological and epistemological stance, and my position regarding literature, theory and research ethics, to the genre or type of qualitative research I employed.

### 2.5 RESEARCH STRATEGY

Schurink, Fouche and De Vos (2011) point out that various qualitative research strategies or designs are available to researchers. However, the following traditions are regarded keys: biography, ethnography, phenomenology, grounded theory, case study, life history, narrative research, participant observation and content analysis (Creswell, 2007; McCaslen & Scott, 2003; Patton, 2002; Denzin & Lincoln, 2005; Schurink et al., 2011).

I opted for grounded theory in light of the study's aims. These are: Identifying and reporting on considerations to the design of an intentional and future-oriented leadership development systems, from field data; differentiating considerations to the design of leadership development systems into a frame of interrelation; and constructing a series of considerations and logic to its effect on the design of a system for the development of organisational leadership. The intent with this grounded theory study was therefore to examine perceptions of leaders in management and leadership development, and to integrate those perceptions with abstract constructs in developing a theoretical frame as organisational leadership development architecture.

Taylor, Bogdan and DeVault (2016, p. 164) offer the following broad definition of this strategy:

*The grounded theory approach is a method for discovering theories, concepts, hypotheses, and propositions directly from data rather than from a priori assumptions, other research, or existing theoretical frameworks.*



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Timmermans and Tavory (2007) point out that *qualitative analysis for social scientists* (Strauss 1987) and *Basics of qualitative research* (Strauss & Corbin 1990) contributed to transform grounded theory (GT) into a dominant qualitative approach. Together with subsequent developments (see, for example, Reichertz, 2019, pp. 259-281) grounded theory has been responsible for a number of highlights in qualitative inquiry generally. Tracy (2013, p. 184) writes: “I estimate that at least 80 per cent of qualitative articles say something like, ‘I used a version of grounded theory and the constant comparative method for analysing my qualitative data.’” Charmaz (2014), locating the national, historical, and disciplinary origins of GT states that GT are employed in a variety of disciplines, across the world, as method in qualitative inquiry.

As Bryant (2019, pp. 5-29) points out contemporary grounded theory entails *a family of variants*. These are: (a) Glaser and Strauss’ canonical works in the nineteen sixties; (b) Strauss and Corbin’s work in the 1990s, Glaser’s 1990s work, and Charmaz’s (2000, 2006, 2014) and Bryant’s (2002, 2017) works.

With grounded theory having flourished into several different approaches since its inception in 1967, it is today very popular with extensive presence in the literature resulting, in it being a complex research tradition or strategy comprising many facets. In the next section, including Bryman’s (2012, pp. 568-570) helpful *tools* and *outcomes* in grounded theory I outline what can arguably be regarded as this genre’s essential ingredients.

### 2.5.1 Key Features

The key aspects of grounded theory are constant comparison, theoretical sensitivity, memoing, theoretical sampling, saturation and coding.

- **Constant comparison**

Constant comparison entails the essence of grounded theory in creating theory out of data. Stern (2008) points out that instead of the computer being the analysing instrument, the analysing instrument is the researcher's brain. She continues:

*If the researcher is using interview and observational data, each episode is coded and compared with every other episode for*

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*similarities and differences to answer the question, “What is going on here?” In this method, **data-gathering and analysis go on simultaneously rather than at the end of data collection.** The interview schedule and observation site will evolve as the developing theory begins to take shape. When the researcher is able to group analyzed data into categories, those categories are examined for how they are related to one another and then collapsed under a higher level category until the central category that explains most of variation in the data is revealed or “discovered,” as Glaser and Strauss put it. The process holds for other kinds of data, documents, and records as well as the work of other authors (Stern, 2008, p. 115) (emphasis added).*

- **Theoretical sampling**

Coined by Glaser and Strauss (1967, p. 62) “Theoretical sampling is done in order to discover categories and their properties and to suggest the interrelationships into a theory.” Taylor, Bogdan and Devault (2016, p. 108) emphasise:

*In theoretical sampling... (w)hat is important is the potential of each case to aid the researcher in developing theoretical insights into the area of social life being studied. After completing interviews with several informants, you consciously vary the type of people interviewed until you have uncovered a broad range of perspectives held by the people in whom you are interested.*

Charmaz and Belgrave (2019, p.746) add that theoretical sampling enables you to seek additional data single out properties to the conceptual category you are developing. Also, they emphasise that these cannot be defined in advance as they are the result of analysing data and subsequent focusing data collection (Charmaz & Belgrave, 2019, p.746).

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- **Coding**

Charmaz and Belgrave (2019, page 13 of 30) write:

*Coding is the pivotal first analytic step that moves the researcher from description toward conceptualizing that description. Coding requires close attention to the data. Nonetheless, the codes reflect the researcher's interests and perspectives as well as information in the data.*

Bryman (2012, p. 575) adds that coding implies reviewing research findings, by “...giving labels (names) to component parts that seem to be of potential theoretical significance and/or that appear to be particularly salient within the social worlds of those being studied.”

Coding is a process involving different steps. Open coding or initial coding (Charmaz, 2014) resembles the starting point following by more structured ways of coding, namely: axial coding (Strauss & Corbin, 1990) or focused coding (Charmaz, 2014), and selective coding (Glaser, 1978).

The aims of the three coding steps vary: (a) Open coding strives to break down, examine, compare, conceptualise and categorise data (Strauss & Corbin, 1990, p. 61); (b) the aim with axial coding is to put data back together in new ways by making connections between categories (Strauss & Corbin, 1990, p. 96), and (c) selective coding, that is “...selecting the core category, systematically relating it to other categories, validating those relationships, and filling in categories that need further refinement and development” (Strauss & Corbin, 1990, p.116). I proceeded with the coding in a manual way, rather than making use of computer applications useful in coding. I selected this way as it necessitated me being immersed in data for long periods.

- **Memoing**

Memos comprise the documentation of the researcher's thoughts, comments and reflections on samples, categories and their modification, and emerging theory (Heppner & Heppner, 2004). Thornberg (2012) explains memoing as the

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documentation of the thinking process by the researcher in theory development. The memos document the thoughts of the researcher, and thereby provide a paper trail of his or her conceptual ideas, thoughts on possible theoretical sampling, documentation of analysis, and therefore become elements to the theory being developed (Elliott & Lazenbatt, 2004). For Charmaz and Henwood (2017, page 4 of 24) writing memos is the key step between coding and writing drafts. Grounded theorists may write memos through the course of the research as they motivate them to pause and contemplate data, codes, and/or emerging theory.

*Memos may range from fleeting ideas (Strauss, 1987) to analytic statements that take a code apart and explore its potential for development as a theoretical category (Charmaz, 2014). Memo-writing prompts us to develop our ideas about our codes and to treat significant ones as tentative categories to explore and to check through further data-gathering (Charmaz & Henwood, 2017, p. 4 of 24).*

- **Theoretical saturation**

Glaser and Strauss (1967) offer theoretical saturation as the point when the grounded theory researcher notices similar instances over and over again. When this comes about they cease further data collection and analysis because it seems likely that to carry on would be pointless (Bloor & Wood, 2011, p. 2 of 3).

- **Concept**

A concept is: “(a) name given to a grouping of phenomena that organizes observations and ideas by virtue of their possessing common features. In grounded theory, a concept is a key building block in the construction of a theory” (Bryman, 2020, p. 710).

- **Properties and hypotheses**

“Properties refer to the unique attributes of a category while hypotheses entail initial assumptions about the relationships between concepts” (Marule, 2016, p. 30).

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- **Categories**

Categories; "...are conceptual elements that 'cover' or span many individual examples (or bits or units of the data you previously identified) of the category" (Merriam & Tisdell, 2016, p. 206). Having been elaborated, categories are concepts representing real-world phenomena (Bryman, 2012, p.570). Also, categories may subsume two or more concepts, and, finally, "...a category may become a core category around which the other categories pivot" (Bryman, 2012, p.570).

- **Theory**

Theory is a generalisation about a phenomenon; an explanation of how or why something transpires. Theory resembles "a set of well-developed categories that are systematically related through statements of relationship to form a theoretical framework that explains some relevant phenomenon" (Corbin & Strauss, 1998, p. 22). As I already indicated, two types of theory are distinguished in grounded theory, namely, substantive theory and formal theory.

*The former relates to theory in a certain empirical instance or substantive area, such as occupational socialization. A formal theory is at a higher level of abstraction and has a wider range of applicability to several substantive areas, such as socialization in a number of spheres, suggesting that higher-level processes are at work. The generation of formal theory requires data collection in contrasting settings (Bryman, 2012, p.570).*

- **Key steps**

From a practical methodological perspective, Charmaz (2006, p. 5) offers seven key steps of GT:

- Undertaking data collection and analysis simultaneously
- Developing analytic codes and categories from data instead of preconceived logically deduced hypothesis
- Utilising constant comparison at each stage of analysis
- Proceeding with theory development during each step of data collection and

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analysis

- Writing memos in order to elaborate categories, specifying their properties, defining relationships between categories, and identifying gaps in categories
- Sampling with the aim of constructing theory
- Conducting literature reviews after data analysis.

I wish to point out, provided the above reference to Charmaz in steps to GT, that the approach I adopt in GT leans to that of Charmaz, and not the alternative approach provided by Glaser.

This concludes the discussion of grounded theory as research strategy of the study. Next, I outline the research methodology.

### 2.6 RESEARCH METHODOLOGY

How research is done including various logistical, relational, ethical and credibility matters relate to *methodology* (Bloomberg & Volpe, 2008, p. 73). In contrast to the linear research model found in quantitative research, qualitative research entails a circular process with the researcher moving back and forth during the various phases of the process (Eriksson & Kovalainen, 2008, p. 31). Schurink et al. (2011, p. 327) write:

*The process whereby qualitative research is designed follows a cyclic path in order to allow for critical reflection on one stage before proceeding to the next. Because the qualitative research design is flexible, a **full account of the research design can only be provided in retrospect** (emphasis added).*

Taking the research process as a whole, the key decision-taking steps I took in the study are best presented under: locating sites, selecting research participants and gaining access, data collection, data-capturing and storage, data analysis, presenting the research and writing styles, and ensuring quality research.

### **2.6.1 Selecting Research Participants**

*Collecting data for qualitative research usually implies interacting with real-world situations and the people in them. ...The variety of field studies adds to numerous important and interesting human events that can become the subject of qualitative studies (Yin, 2011, p. 109).*

In light of my aim to create organisational leadership development architecture imbedded in leadership development systems designs, by making use of qualitative methods, I searched for participants who had the ability to share their experiences and views about the systems per se. Important were their perceptions of specifically what influenced these systems. Therefore, I focused on the participants, and not on locations where leadership development systems could be found.

Here my experience of having worked in management and leadership development for many years was invaluable. Brain-storming sessions with Dr Viljoen, my first study leader, who has considerable practical knowledge in organisational and leadership development, were equally important.

My initial sampling strategy can be described as purposeful (Coyne, 1997). As, Bloomberg and Volpe (2008, p. 69) comment the primary logic with purposeful sampling is to select “information-rich cases”. As you strive to discover you select from what you can learn most (Merriam & Tisdell 2016, p. 440). I argued that interviewing knowledgeable persons would enable each to share unique information, and at the same time this would offer me the opportunity of building initial categories from what they share (see, Bitsch, 2005; Jones & Alony, 2011; Suddaby, 2006).

Table 2.1 portrays the 10 managers who took part in the research according to the afore-mentioned criteria.



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**Table 2.1: The participants according to the criteria**

Manager <sup>1</sup>	Insight into leadership and its complexity	Insight into leadership systems and their development	Leaders within the function of leadership development
Alpha	X	X	X
Bravo	X	X	X
Charlie	X		X
Delta	X	X	X
Echo	X	X	X
Foxtrot	X	X	
Golf	X	X	
Hotel	X	X	
India	X		
Juliet	X		

## • Researcher-participant Relationships

*A significant portion of qualitative research involves collecting data from research participants. The kinds of information that participants disclose in a research setting depend in part on the nature and quality of their relationship with the researcher. Researcher-participant relationships may exist anywhere along a continuum from distant, detached and impersonal to close, collaborative and friendly. The relationship between a researcher and participants may evolve and change over the course of a research project, especially if that research project progresses over an extended period of time, as is common in many forms of qualitative research. Important methodological and ethical considerations arise from the nature and quality of researcher-participant relationships (McGinn,*

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<sup>1</sup> To avoid disclosing the participants' identity I used the phonetic alphabet.



2008, p. 767).

As Eriksson and Kovalainen (2011, p.59) aptly point out the roles and positions of the qualitative researcher normally change during the research process; "...it is typical that the distance between the researcher and the participants is diminished in qualitative business research."

A final related point here entails the researcher's position of power, emotional stance and self-disclosure. While some scholars are of the opinion that researchers should always be straightforward and reveal their views and reasons for the research, others believe that in light of usual deceitfulness marking everyday life (Douglas, 1985), this is not necessary. Kvale (1996) proposes a posture lying between those extremes. This requires interviewers dropping "...any presuppositions and judgment while maintaining openness to new and unexpected findings" (Tracy, 2013, p.142).

In accordance with my constructivist position I maintained, an open and unfolding stance (see Chapter 6).

### **2.6.2 Data Collection**

*To reduce the likelihood of misinterpretation, (qualitative researchers) employ various procedures... These procedures, called triangulation, are considered a process of using multiple perceptions to clarify meaning (Bloomberg & Volpe, 2008, pp. 72).*

While following the practice of qualitative inquiry of employing multiple methods I mainly collected data on participants' experiences and views by means of interviews, and, to a lesser extent, through participant observation, and by using unsolicited, personal documents.

- **Interviewing**

As Bryman (2012, p. 469) correctly points out the interview is undoubtedly the method most extensively used in qualitative research. There are good reasons for this state of affairs:

*Through interviews, participants can provide accounts – or*

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*rationales, explanations, and justifications for their actions and opinions. Interviewees can reveal **their specific vocabulary and language and explain why they employ certain clichés, jargon, or slang**. Interviews are especially valuable for providing information and background on issues that cannot be observed or efficiently accessed...Interviews may also access information on past events, rare occasions, dastardly deeds, clandestine trysts, disasters, celebrations, or buried emotions (Tracy, 2013, p.132) (emphasis added).*

From the qualitative inquiry literature it is clear that while various types of interviews are used by qualitative researchers the two main types employed are unstructured and semi-structured interviews (Bryman, 2012, p. 469).

The nature and form of the interviewing I used can be described as semi-structured falling within the category of conversational techniques (Lee, 1999). As Lee (1999) points out when employing unstructured interviewing one needs to have conceptual clarity regarding guiding topics or themes. These need to be exploratory or confirmatory; unstructured or structured in order to generate or test theory.

*(M)ost interviews in qualitative research are semi-structured; thus the interview guide will probably contain several specific questions that you want to ask everyone, some more open-ended questions that could be followed up with probes, and perhaps a list of some areas, topics, and issues that you want to know more about but do not have enough information about at the outset of your study to form specific questions (Merriam & Tisdell, 2016, p. 125).*

I made use of a standard question to commence the interviews. The interviews were conversational, and semi structured interviews. Insights gained during an interview guided that interview. In addition, insights gained from interviews contributed to later interviews as themes to explore. The interviews were conducted during 2018, 2019, and 2020.

Believing that people's constructed meaning bring about unique perspectives as

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outlined subsequently, grounded theory facilitates on-going data collection and analysis to a point of saturation. This makes decisions on the number of interviews required difficult. Tracy (2013, p. 117) writes: "Not enough interviews will result in shallow and stale contributions. Too many will result in a paralysing amount of data, which discourages transcription and penetrating interpretations".

I conducted 10 interviews typically lasting 90 minutes each. Four interviews took place with the initial sample of four participants. A later six additional interviews were made. These took place in settings of the participants' choice; most being conducted within their offices, whilst two took place in a public space. A further four consultations took place, other than the 10 interviews, during the selective coding process. These consultations included participants from the initial sample.

- **Participant Observation**

*Participant observation is a method of data collection in which the researcher takes part in everyday activities related to an area of social life in order to study an aspect of that life through the observation of events in their natural contexts. The purpose ... is to gain a deep understanding of a particular topic or situation through the meanings ascribed to it by the individuals who live and experience it (McKechnie, 2012, p. 2 of 3).*

There are a number of variations of participant observation. Lee (1999) refers to the following: (a) The complete participant where the researcher, as organisational member, covertly participates in the research whilst not declaring his or her scientific intentions; (b) the participant as observer where the researcher overtly participates as researcher; (c) the observer as participant where the researcher overtly participates in the study as if he or she were part of the phenomenon being researched, and (d) the researcher as complete observer where he or she stays in the background and observes participants' actions, views and circumstances.

In line with my constructionist stance I participated overtly.

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- **Documents and artefacts**

Obtaining data from documents and artefacts from participants is valuable in complementing data gained from interviews and participant observation.

*Common documents include official records, organizational promotional materials, letters, newspaper, accounts, poems, songs, corporate records, government documents, historical accounts, diaries, autobiographies, blogs, and so on (Merriam & Tisdell, 2016, pp.162-163).*

Norum (2008) points out that artefacts can enrich any study by elucidating aspects of a person, society, or culture. Merriam and Tisdell (2016, p.162) write:

*Artefacts are usually three-dimensional, physical “things” or objects in the environment that represent some form of communication that is meaningful to participants and/or the setting. Examples might be art pieces, organizational or school symbols, trophies, awards, or personal gifts, to name a few (emphasis in original).*

While I could not secure any artefacts, I was fortunate that Charlie shared a research article he authored and Echo shared sketches he drew during our interviews.

### **2.6.3 Data-capturing and Data storage**

*Storage of data relating to research projects should be taken seriously from the outset to ensure that valuable qualitative data resources are kept safe during the research process and beyond ... Both digital and non-digital aspects of storage must be considered by those who create, store, and curate data. There are a number of considerations relating to data storage, including data preparation procedures, confidentiality of data, physical conditions, and security (Corti, 2008, p.199).*

Various scholars (Eriksson & Kovalainen, 2008; Mckillip, 2011; Sherry, 2013; Taylor, Bogdan & DeValt, 2016, p. 44) refer to ways in which one can capture and store

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qualitative data, like compiling field notes, making recordings, and keeping a research diary. I recorded the interviews, wrote memos and notes, and kept a research journal.

- **Audio-recordings**

Since qualitative data consists to a very large extent of words, a recording device during interviewing enable the interviewer “to capture more than he or she could by relying on memory” (Taylor, Bogdan & DeVault, 2016, p. 130). Other benefits of recording interviews include: (a) Improving focus, concentration and listening, and improve one’s response; (b) sensitising conducting the interviews with minimal disruption; (c) providing a clear view of the discussions held; and (d) having a recording of interviews available for revision during analysis (Qu & Dumay, 2011).

As agreed in the informed consent I recorded the interviews.

- **Transcriptions**

*Transcription is the act of recording and preparing a record of a respondent's own words, and it yields a written account – a text – of what a respondent or informant said in response to a fieldworker's query or what respondents said to one another in conversation. The transcription may result from retyped handwritten notes or audio recordings (Schwandt, 2007, p. 296).*

I transcribed the interview recordings and found that this assisted me in focusing and concentration, and provided a clear view of the discussions held (Qu & Dumay, 2011). I transcribed the conversations in the participants’ own words, with the exception of parts of conversations that was unclear, conversation not relevant to the study, or parts that could breach confidentiality (see Appendix B for an example).

- **Field notes**

*In field notes, qualitative researchers record in-depth descriptive details of people (including themselves), places, things, and events, as well as reflections on data, patterns, and the process of research. These details form the context and quality control that shape*

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*multiple qualitative data points into articulated, meaningful, and integrated research findings (Brodsky, 2008, p. 342).*

Thus, as Bryman (2012, p. 711) summarises, field notes entail a detailed chronicle of events, conversations and behaviour, and one's initial reflections on these.

I used field notes to document my thoughts regarding possible interrelationships between the emerging categories, and how they might be consolidated into a framework. My notes were not limited to the data, but also included thoughts on the literature. Finally, I noted my thoughts on ways in which I might have shaped the interpretation of the data. (See Appendix C for an example.)

- **Memos**

These are the documentation of the researcher's thoughts, comments and reflections on samples, categories and their modification, and emerging theory (Heppner & Heppner, 2004). Thornberg (2012) explains memoing as the documentation of the researcher's thinking process in theory development. Memos provide a paper trail of the researcher's conceptual ideas, thoughts on theoretical sampling, documentation of analysis, and therefore become elements to the theory being developed (Elliott & Lazenbatt, 2004).

I compiled memos on each tentative theoretical category, focusing on elements or the properties of the categories I developed. These were invaluable during axial coding, when I contemplated the interrelationships between categories and paradoxes I found in constructing categories (see Appendix D for an example). As with my field notes, I kept manuscript books in which I documented my thoughts.

- **Research journal/diary**

Keeping a personal journal or diary, in which you capture the feelings and emotions you experienced during the research, is valuable, if not essential. Yin (2011, p. 175) writes:

*In qualitative research, such a journal can play more than a private role. Because you the researcher are ... the main research*

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*instrument, any introspections and insights into your reactions or feelings about on-going fieldwork (or the study as a whole) may later reveal unwanted biases. Keeping a journal also can surface your own methodological or personal tendencies over time. You may not have been aware of such tendencies, but acknowledging them may lead to useful thoughts about how to approach your later analysis.*

As Schurink (2009) points out, researchers can use what they chronicled in their journals and diaries to compile what he (Schurink) terms “research stories,” which, in turn, can serve as audit trails. For Plummer (2001) such audit trails provide information of the process by which knowledge was produced.

I kept record of my decisions, activities, thoughts and emotions throughout the research journey; from deciding on the research topic, presenting the research proposal, selecting research sites and participants, doing fieldwork and starting to make sense of the data, to performing intensive analysis and writing and finalising the thesis.

- **Secured storage**

In addition to capturing the volume of materials generated by qualitative research one needs to consider their secure storage very carefully. Yin (2011, p. 173) states:

*Given the desired protection of human subjects, a major threat would result from improper indulgence of the identities of the people or places in your fieldwork. As a result you may have to plan for deleting such information before storing your records. This task is made more difficult by the information automatically stored as part of today's digital photos and records.*

I took special care to ensure that all recordings, transcriptions and field notes were safely stored in filing cabinets in my study at home. I safeguarded all digital documents on my Google drive.



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- **Data Analysis**

Analysing and gathering data in qualitative research entail iterative processes (Van den Hoonaard & Van den Hoonaard, 2008; Merriam & Tisdell, 2016, p. 125; Taylor, Bogdan & DeVault, 2016, p. 169).

***In qualitative research, data collection and analysis go hand in hand.** Throughout participant observation, in-depth interviewing, and other qualitative research, researchers are constantly theorizing and trying to make sense of their data. They keep track of emerging themes and ideas, read through their field notes or transcripts, and develop concepts and propositions to begin to interpret their data. As their studies progress, they begin to focus their research interests, ask directive questions, check out informants' stories, and follow up on leads and hunches (Taylor, Bogdan & DeVault, 2016, p. 169) (emphasis added).*

In line with grounded theory, I applied all three coding practices, namely, open coding, axial coding, and selective coding.

In applying open coding, I considered similarities and differences in the accounts the interviewees shared with me, and develop my first set of categories which served as a provisional frame. In considering categories and themes I ensured that data fragments fitted their meaning. This, I found to be a process of reduction or limiting categories (Locke, 2001). I came up with categories that differed from the first set. At this stage, I regarded them stable since I found no data incidents suggesting new categories (Locke, 2001).

In considering relationships between categories, during axial coding (Walker & Myrick, 2006; Locke, 2001), I believed that I managed to demarcate the categories, but remained open for possible new categories. In the end I did not form any new categories but reduced some categories.

Having conducted four additional interviews or consultations during selective coding to further refine the categories, their properties, and their integration into a theoretical framework of architecture for the development of organisational leadership, I



encountered some paradoxes. These I managed to resolve by attaining the participants' experiences and views.

#### 2.6.4 Presenting the Research and Writing Styles

Different to their quantitative counterparts who use impersonal pronouns and the passive voice attempting to offer an objective, scientific stance, qualitative researchers often reveal their writing and styles in their research reports. More particularly, they tend to use "vivid description, story-telling, and metaphorical language to carry meaning and hold their readers' attention (Eriksson & Kovalainen, 2008, p. 280). One way to this, is to include yourself and your perspectives as researcher in your report writing. Consequently, qualitative researchers no longer write their texts in the third person and in the past tense, but increasingly in the first person present tense. In this way, they become characters in their own narratives (Koro-Ljungberg, MacLure & Ulmer, 2018, p. 813).

Various "tales" (Van Maanen, 1988; Sparkes, 2002; Tracy, 2013) are found in qualitative publications which according to Tracy (2013, p. 252) include "realist and traditional, creative, impressionistic, literary, confessional, and autoethnographic, critical, and formal" work.

Taylor, Bogdan and DeVault (2016, p. 163) write:

*Some qualitative sociologists are experimenting with new forms of narrative...(A)utoethnography...is one example...(w)here researchers tell their own personal stories and try to create in readers subjective understanding of their own experiences and emotions (Ellingson & Ellis, 2008; Ellis & Flaherty, 1992). **By doing so, they blur the lines between research subject and researcher.** Drama (Ellis & Bochner, 1992; Richardson & Lockridge, 1991) and poetic representations (Richardson, 1992; Richardson & St. Pierre, 2005) are additions to the range of qualitative writing (emphasis added).*

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I used the following writing styles to some extent:

- **The scientific tale**

The scientific form has been dominant in scholarly writing. Plummer (2001, p. 169) writes:

*In the world of objectivist, positivist social science, writing generally parodies the style of the physical sciences; the tables, the findings, the tested hypotheses, simply speak for themselves and the exercise is simply one of presenting not writing "the findings." The style here is largely that of the external privileged reporter merely reporting what has been found scientific writing aims to be objective by using impersonal pronouns and the passive voice.*

The scientific tale is formal, logical and, where applicable, mathematical; it is logic-scientific (Sparkes, 2002) giving the impression that any other scientist in the same situation will reach the same conclusion(s) (Labuschagne, 2012, p.69).

I employed the scientific tale in Chapters 1, 2, 3, 4, 5 and 7.

- **The realist tale**

In realist tales, the words, actions and (presumably) thoughts of the research participants are visible while the author is almost completely absent from the text (Sparkes, 2002). In applying, the realist writing style, the author typically uses excerpts from the research participants' accounts (Sparkes, 2002).

*The fieldworker (researcher), having finished the job of collecting data, simply vanishes behind a steady, descriptive narrative ... The narrator of realist tales poses as an impersonal conduit who ... passes on more or less objective data in a measured intellectual style that is uncontaminated by personal bias (Van Maanen, 1988, pp. 46–47). Examples of the realist tale are offered in Chapter 3.*

- **The confessional tale**

While qualitative researchers need to be self-reflexive, that is, assess how their views and experiences influence the research and share this with the reader they only foreground in a confessional tale (Tracy, 2013, p. 256). “Confessional tales are packed full of stories about the researcher’s motivations, foibles, and backstage shenanigans...The main character – the author – is often portrayed as clever or sympathetic, if imperfect (Tracy, 2013, p. 256). Sparkes (2002, p. 60) declares:

*The (researcher’s) point of view is often represented...as part of a character-building conversation tale in which the researcher, who had a view of how things might happen at the start of the study, comes to see things very differently as the study progresses. As part of this process of coming to know how and, by definition, getting closer to the participants’ view of their world, confessional tales often include episodes of fieldworker shock and surprise. The blunders and mistakes made, the social gaffes committed, and the secrets unwittingly unearthed are also revealed as part of this coming to know.*

In Chapter 6, The Research Story, I offer some backstage confessional tales.

- **Auto-ethnography**

Ellis (2008, p. 49), arguable the most prominent auto-ethnographer, points out that in the auto-ethnographic writing style, “... the life of the researcher becomes a conscious part of what is studied.” Sparkes (2002, p. 100) writes:

*Auto-ethnographies and narratives of the self...have the potential to challenge disembodied ways of knowing and enhance empathetic forms of understanding by seeing our “actual worlds”. The stories are not just **about** the body; they are through the body of the author. They come out of the body and voiced in multiple ways that can connect people in their shared vulnerabilities, even though they may*

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*occupy different subject positions (emphasis in original).*

My offering of my self-narrative also appears in Chapter 6.

In this final section of the chapter I indicate strategies employed to ensure quality research.

### 2.6.5 Ensuring quality research

As Elliott and Lazenbatt (2005) caution, researchers often weaken grounded theory's quality by not sticking to its components and requirements therefore I adhered to its principles to the best of my ability.

However, in order to assure the study's overall quality, I had to look at what was required for good qualitative research generally. As Tracy (2013, p. 228) asks: "(H)ow do you make your qualitative project attractive, credible, and likely to be taken seriously? Indeed, what ought a qualitative study to be? How do we identify high-quality qualitative work?" Turning to the qualitative inquiry literature I was struck that assessing qualitative studies was held in controversy (Bloomberg & Volpe, 2008; Bryman & Bell, 2003; Schurink, 2009; Tracy, 2010). Schurink et al. (2011, p. 421) write:

*It appears that currently at least three distinct perspectives on assessing the quality of qualitative research are found among scholars. These perspectives are: (i) qualitative and quantitative research should be evaluated by the same measures; (ii) standards that have been particularly developed for it; and (iii) what Holloway and Wheeler (2002) call **criteriology**, should be abandoned. The notion of developing criteria of soundness to meet the approval of all qualitative researchers with their different approaches, theoretical backgrounds, methodological principles, research issues and aims is being increasingly discarded or, as Schwandt (2007) states, qualitative researchers have **gone beyond it** (emphasis in original).*

It is important to emphasise that since there is no consensus between qualitative

researchers regarding criteria to assess qualitative research this does not imply that anything goes and that it has become unscientific. To the contrary, qualitative researchers have started moving to encourage quality in the research process. “Thus the notion of management of the research process, transparency with specific reference to the auditing trail or research story and reflexivity became important strategies to ensure quality research” (Schurink, 2009, p. 795). In fact, managing the research process is regarded by some scholars as more important than using criteria (Tracy, 2013, p. 228). I offer my auditing trail as part of my research story in Chapter 6.

While qualitative researchers employing different research strategies or genres, have diverse views when it comes to quality qualitative research (Torrance, 2018, p. 1325). A set of trustworthy criteria developed by Guba and Lincoln (1994) is widely regarded as an important measure of trustworthiness. Bryman (2012, p. 390) lists that criteria in quantitative research as follows:

- a. Credibility, which parallels internal validity;
- b. Transferability, which parallels external validity;
- c. Dependability, which parallels reliability;
- d. Confirmability, which parallels objectivity.

My application of the criteria and strategies in assessing the study's quality are presented in Chapter 7.

## **2.7 SUMMARY**

The research approach and methodology of the study are presented in this chapter. Firstly, I indicated why I opted for a qualitative research approach, secondly, I outlined qualitative research and its key features, thirdly, I stated my key philosophical positions, fourthly, I provided my position with regard to the role of literature in the research, indicated how I converted the research findings into theory and how I managed research ethics, and fifthly, I described the research strategy that was utilised. I concluded the chapter with an exposition of the key steps I followed during the research process.

## CHAPTER 3

### RESEARCH FINDINGS

#### 3.1 INTRODUCTION

This thesis has the purpose to examine perceptions of leaders in management and leadership development to create an organisational leadership development architecture. The following research aims are included in this study:

- Identifying and reporting on considerations to the design of an intentional and future-oriented leadership development systems, from field data;
- Differentiating considerations to the design of leadership development systems into a frame of interrelation; and
- Constructing a series of considerations and logic to its effect on the design of a system for the development of organisational leadership.

In this chapter I present research findings in the form of thematic categories as products of open coding. These categories form the basis of further analysis to identify considerations to the design of leadership development systems. A further phase of analysis is described in the following chapter in considering interrelationships between thematic categories, as a process of Axial Coding, towards a conceptual whole picture (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001).

This chapter also presents findings from data and references to extant literature.<sup>2</sup>

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<sup>2</sup> I wish to point out, at the onset of this chapter, that the reader may ask whether it would not have been better to integrate ideas to reduce the chapter's length to a manageable 30 to 40 pages. I could separate the report of findings into multiple chapters of more manageable 30 to 40 pages. This alternative would present six separate chapters, in the same form presenting six thematic categories. Another alternative would have been to separate data findings from extant literature in its presentation. Findings from data would thus be presented as a chapter, with extant literature and conclusions within another. I chose not to adopt the alternative approaches mentioned. I opted to maintain sections based on data and extant literature together, as the combination thereof forms a story per category and the categories form stories that are relative to each other. I believe that the development of those

### **3.2 THE CODING PROCESS**

In this section, I provide a description of the initial activity in data analysis. I believe the following are important for clarity: (a) I report on findings from the analysis. (b) I refer to my initial activity as the description includes my analysis by open and elements of axial coding. (c) I report in more detail on axial coding in Chapter 4. (d) I finally, acknowledge that data analysis is iterative in collection and analysis with a weaving between open and axial coding in analysis, hence the following description that comprise open and elements of axial coding.

My first consideration of data initiated the process of open coding that brought about a frame of provisional categories. These categories were named per data set derived from four research participants as part of the purposeful sampling process.

Open coding is a process of identifying categories from data, together with properties thereto (Strauss & Corbin, 1990; Walker & Myrick, 2006). Lawrence and Tar (2013) refer to open coding as categorising and naming incidents from data, or data fragments (Lee, 1999) to form categories. I considered data fragments to identify themes that I could name. Analysis was not done across data sets at this point (Locke, 2001). The provisional categories, labelled per data set, are provided in Table 3.1. This provisional frame was refined with later analysis.

The data collection and analysis continued as iterative processes of collection and comparative analysis. Suddaby (2006, p. 636) indicates that there is “no clean break between collecting and analysing data.” However, the purpose is to move from observation towards abstract theoretical categories through iterative collection and comparative analysis (Suddaby, 2006). Therefore, researchers using grounded theory comparatively analyse data with other data towards researcher developed categories grounded in data (Mills et al., 2006). The basic analytical tool, coding, is considered to be “...operations by which data are broken down...and put back together in new ways”

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stories is best achieved by grouping together data findings, extant literature that responds to those findings and conclusions.



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(Strauss & Corbin, 1990, p. 57).

I used insight gained from provisional categories to “contaminate” further interviews (Schurink, 2018) for data collection. While the provisional categories set a temporary frame for continual data collection and analysis, I was mindful that categories could be developed further, or that different categories might emerge or might even replace the provisional ones (Bhattacharjee, 2012).

**Table 3.1: Initial frame of provisional categories that surfaced per data set of four participants**

Participant	Provisional categories named from contributions by four participants
Alpha	Nature of learning practice Required purpose to learning Sustaining wisdom Connectedness Qualities to learn
Bravo	Authenticity Ontology to learning Purpose to learning Unlock wisdom
Charlie	Situational awareness Foundation Leadership capacity Ontology of leadership
Delta	Foundation Situational awareness Providing direction Future orientation Uncertain future

The initial frame with provisional categories, as illustrated in Table 3.1 changed as it was broadened and refined with subsequent data collection and analysis. The on-going data collection by “contaminated interviews” (Schurink, 2018), apart from providing data, contributed to my understanding of data (Guba & Lincoln, 1994; Bitsch, 2005; Jones & Alony, 2011; Coyne, 1997; Wahyuni, 2012).



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I started to compare provisional categories with others, as well as fragments from other data collected (Lee, 1999). I compared data fragments with categories to locate appropriate fragments to categories across categories. This comparative and iterative process produced a further frame of categories that I considered as a first set of nine substantive categories illustrated by Table 3.2. Note that, as data collection and analysis are on-going processes, I formed the categories with data gathered from seven participants at the time. I was mindful that categories could be further developed, or could change. More categories might emerge as more data was collected and further analysis took place. (Bhattacharjee, 2012) (I illustrate data fragments from different data sources that I considered to form the first set of substantive categories with Appendix E.)

**Table 3.2: A first set of nine substantive categories**

<b>A first set of substantive categories</b> that followed the initial frame of provisional categories	
1.	Development systems seek out organisational purpose.
2.	Multiplicity to direction
3.	Organisations bring about simplicity to learning paradigm.
4.	Development systems cultivate connectedness with environment
5.	Organisations uphold tradition in development
6.	Organisations uphold liberalism in development
7.	Development systems sustain wisdom
8.	Development systems focus on quality
9.	Development systems provide focus

During the open coding, I noted my thoughts, comments and reflections on data, categories and their elements (Heppner & Heppner, 2004). I found, that writing memos assisted me in naming themes and reflection on themes. I found a practice described by Locke (2001) useful for making memos on the borders of data pages. I was sensitised, with time spent considering the data, to either further data fragments that contributed to a category, or to create categories better suited as elements to other categories. However, the memos were not merely tools in documenting my thinking

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process (Thornberg, 2012), but also served as reminders of matters to pursue with on-going sampling at a later stage, or regarding themes at later stages of data analysis (Elliott & Lazenbatt, 2005).

A shift occurred from what I believed to be a first set of nine substantive categories to a subsequent set of seven substantive categories. I proceeded to consider similarities and differences between categories within my first set of nine substantive categories (as reflected in Table 3.2), as well as with data fragments from later data. With time spent on data and with the addition of more data sets I have moved from filtering and sorting data towards to a more abstract understanding of data (Charmaz, 2012). I considered categories and whether data fragments fitted the meaning I attached to categories (Lee, 1999). I looked for repetition. However, not necessarily in frequency of repetition to data fragments, but categorically in terms of units in meaning. The later set of seven substantive categories is illustrated in Table 3.3. At this stage, based on the view that data incidents would not create new categories, I considered my categories to be stable (Locke, 2001).

I experienced that further field data did not contribute to the expansion of categories. This constituted what I believed to be a point of saturation: "When additional analysis no longer contributed to discovering anything new about a category" (Strauss, 1987, p. 21). Locke (2001) similarly views saturation as the point where later data incidents do not lead to "new naming activity regarding that category, its development would be complete." Thus, data incidents do not contribute further to defining a category or its properties (Locke, 2001).

It may be argued that the comparison of meaning, which would form conceptual categories, is typical of axial coding practice. Bloomberg and Volpe (2008) do, however, stress that the coding process is not a linear process in comparing data, categories and elements (also see Locke, 2001; Lawrence & Tar, 2013). Owing to the afore-mentioned non-linear consideration of data my analysis weaves between practices of open and axial coding. (A comprehensive report on my axial coding practice and results is provided with Chapter 4.)

As no new categories were forthcoming I reduced them during axial coding further from seven to six. Table 3.3 reflects the categories I believed to be saturated with open

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coding together with a reduced number of categories, in axial coding, as a result from comparison of the meaning I made. Finally I considered a frame of six substantive categories that I reported on as findings.

**Table 3.3: Frame of categories as delimited by the researcher**

Frame of seven substantive categories as delimited by the researcher during open coding	Frame of six substantive categories as product from axial coding (To be discussed in Chapter 4)
<ol style="list-style-type: none"> <li>1. Dual Cores</li> <li>2. Purposing and Cowardice</li> <li>3. A Point in Time, or Time Series</li> <li>4. Choosing Doorways</li> <li>5. Making Sense</li> <li>6. Leaders learn from leaders</li> <li>7. Transform Development</li> </ol>	<ol style="list-style-type: none"> <li>1. Dual Cores</li> <li>2. Purposing and Cowardice</li> <li>3. A Point in Time, or Time Series</li> <li>4. Choosing Doorways</li> <li>5. Making Sense</li> <li>6. Leaders learn from leaders</li> </ol>

I considered the frame of six categories to be stable given my view of saturation, and commenced to introduce extant literature to categories. The review of literature contributed to form meaning to concepts (Huysamen, 1993), and assisted in augmenting the categories (Bloomberg & Volpe, 2008; Chiovitti & Piran, 2003; Suddaby, 2006; Thornberg, 2012; Mills et al., 2006). I did this in accordance with Suddaby's view (2006), that argued that the inability of the researcher to raise data to a conceptual level is often linked to the researcher's failure to interplay data and extant knowledge.

**The frame of six categories is presented as research findings and a readable narrative (Bloomberg & Volpe, 2008). More particularly, I offer the analysis in sub-sections that provides a category in a narrative form, with references to participant contributions. Extant literature is also introduced per sub-section. I conclude each sub-section with key constructs I derive from the category.**

The frame of categories that I present as research findings are: (a) Purposing and

Cowardice, (b) A Point in Time, or Time Series, (c) Choosing Doorways, (d), Interaction between Dual Cores, (e) Leaders learn from Leaders, and (f) Making Sense.

The key constructs I took from the categories were not exclusively derived from participant data, but included my insights. This, I did because of my adopting an epistemological position of knowledge being created during researcher-participant interaction. Differently phrased, this constructionist point of view regards reality, or meaning, as being co-constructed through interaction between researcher and participants (Bhatt, 2000; Mills et al., 2006).

Having described the process I followed in data analysis towards six substantive categories from data. Next, I elaborate on the derived categories in an narrative from.

### **3.3 ADVANCING KNOWLEDGE OF CENTRAL CONSTRUCTS TO CATEGORIES**

Having opted to present all the categories in a single chapter resulted in a relatively long chapter. Allowing the reader to continually relate the detail of the discussion to the meaning to the categories, I provide the theme I developed of the six substantive categories as a reference map (see Table 3.4). I trust that this will allow the reader to continually relate the detail of the discussion to the conceptual meaning I made to the categories.

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**Table 3.4: Map to development of substantive categories**

Delimited substantive categories, upon open coding	Frame of categories as delimited by the researcher with axial coding	Theme (The derived central construct that I derive is in bold type)
Purposing and Cowardice	Purposing and Cowardice	Purposing is leadership responsibility in meaning- making; as an outwardly-focused, inclusive, and forward-looking learning process that is grounded in humanity. <b>Leaders</b> are agents of change by <b>learning and creating shared purpose not merely within the organisation, but within the wider environment</b> in which the organisation functions. The expanded view to meaning-making is essential as the centre point to value-creation is not within the organisation, but a product of co-creation by stakeholder networks within an extended social field. The resultant individual and organisational meaning form a basis for future leadership and organisational change and impact. This meaning frames a culture that forms a context to goals, activity, and outcomes. Purposing is organisational and individually authentic. It involves a commonness and truthfulness, not merely amongst organisational leaders and members, but with society, lest it manifests as organisational pathology.
A Point in Time, or Time Series	A Point in Time, or Time Series	A leadership system's learning capacity is its capacity to synthesise awareness and understanding of past events and action, current contextual variables, with a preferred future. This preferred future is framed by the organisational purpose, goals and values: purposing. <b>The logic to leadership system's learning can be either maturation or transformation or a combination of both.</b> Maturation is an inert increase of system capacity to a point of completeness; or transformative towards a different system capacity. A transformative logic relies on insights, or a leadership system's wisdom not to consider a future to be a continuation of the past. Maturation logic places emphasis on mastery of previously mental models, patterns of interaction and activity. The core to maturation is insights gained from experiences and the use of those as basis for future predictions. A common understanding of emphases to the current and past are understood. Divergence to the leadership systems' learning manifests in unsustainable leadership, where organisational activity is not focused, but engaging in mere activity.
Choosing Doorways	Choosing Doorways	An Authenticity Doorway that places emphasis on the presence, or not, of authenticity within the organisation. The absence of authenticity results in corporate numbness. Authentic deliberation on issues, rather than training brings about change, whereas managers and leaders may require support in the practice of authentic deliberation. Authenticity is considered a prerequisite for other training or development.  A Strategy Doorway that distinguishes between operational entry and strategic entry of the development system to the organisation. Strategic entry concerns people – individual and collective – capabilities, and culture in light of the strategy leaders seek to execute. Contrary to the strategic doorway is an operational doorway that makes emphasis on operations, and responding to deficits. This doorway has an incidental contribution to the development of the leadership system.  A Structural Doorway that considers the discretion afforded is required by leaders in their decision-making. Emphasis on this doorway is with the required awareness of environmental factors that have future organisational impact, and the capability to

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Delimited substantive categories, upon open coding	Frame of categories as delimited by the researcher with axial coding	Theme (The derived central construct that I derive is in bold type)
		<p>make long- term plans to prepare the organisation. However, this capability is balanced with the real discretion of leaders to make long-term decisions.</p> <p>An Individualist Doorway that emphasises diversity of individuals within the organisation. The diversity manifests in individualised capabilities and competence, as well as individualised relationships with context. Last mentioned can be described as thinking capacities and disposition to action in context.</p>
Interaction between Dual Cores	Interaction between Dual Cores	<p><b>Leadership as a system, as an integrative system, often creates structure within unfamiliar contexts.</b> The environment may be considered as causal texture where strategic actors affect environmental change. That leadership system's capability in complex and inter-dependent thinking frames consideration of, and selection of a strategic posture for the organisation. A predominant strategic posture to the organisation results from the leadership system's undertaking to create structure. A leadership system's accumulated knowledge; skills and competence contribute to surface choices to be made, but as an input and not substitute to the leadership system's capability in complex and inter-dependent thinking. The leadership system, that provides strategic posture, causes business modelling and that strategic posture affect choices in business strategy levers and operational capabilities. Disruption to the systems' interrelation is in the form of a management system that takes predominance over the interrelationship with internally directed decision-making.</p>
Making Sense	Making Sense	<p><b>The leadership system's</b> capacity to make sense of its environment depends on the <b>capability to gain insight and uncover new alternatives</b> by moving beyond a dominant knowledge structure, and by holding parallel, potentially competing structures. There are three capacities, namely: a continuation of a dominant logic; moving beyond a dominant logic; and holding parallel, potentially competing dominant logics. Dynamic environments may require organisational change. This change has first to take place in knowledge structure, at a level higher than the affected leadership system capability (Tiers 1, 2 and 3). Organisational change, based on leadership systems' wisdom, includes change in knowledge structure at a level higher than the affected leadership system capability, and wider than to focus on the development of an immediately affected tier three capabilities.</p>
Transform Development		
Leaders Learn from Leaders	Leaders Learn from Leaders	<p><b>Leaders learn leadership of organisations, dynamically, directed internally and externally.</b> Emphasis is not the delivery of curricula, but by user-generated knowledge, distributed decision-making and cross-functional collaboration.</p>

Information is required to assist in explaining what may be behind peoples' perceptions. Therefore at this point I offer a profile of the research participants.

### **3.4 BRIEF OVERVIEW OF PARTICIPANTS**

In contextualising the participants' perceptions, I offer "...some of their history and/or background, education, and personal information..." (Bloomberg & Volpe, 2008, p. 70).

**Alpha** is a practitioner that focus on organisational learning in individual, group, and organisational domains. Alpha's experience of 30 years reaches across leadership and consulting roles in both South Africa and other African countries.

**Bravo**, an industrial and consulting psychologist, has acted in a career of 44 years as human development consultant and as professor at Public Higher Education Institutions. Bravo's expertise includes organisational psychology and wellness, executive assessment and counselling, ethics and organisation renewal intervention. Bravo has held positions within the corporate environment, and authored seven books.

**Charlie** is an academic faculty member in International Business and Strategy at a Private Higher Education Institution, and researcher associated with a Public Higher Education Institution. Charlie has a background in strategy development, action learning, scenario planning and systemic thinking, and held various senior positions in the corporate sector.

**Delta** has extensive experience in assessment, assessment centres, training, coaching, competency design, organisational design, talent management, career development and succession planning. Delta has more than 20 years' experience in the HR field in different sectors, for example: mining, financial services, pharmaceuticals, and transportation.

**Echo** has extensive experience in the development of sustainable business models. Echo consults, in context to sustainable business models, on management and leadership development, and strategies thereto. Echo has a range of corporate experience internationally and within South Africa.



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**Foxtrot** is Executive Director, Founder and Faculty Head of a coaching, adult development and consulting organisation within South Africa. The organisation has global reach, partnerships and international recognition that brings about collaboration with world-wide thought leaders and innovation in the industry. Foxtrot believes in integrated, deep learning processes for individual and organisational leadership and transformation.

**Golf** heads an executive education branch of a Private Higher Education institution in South Africa, and previously performed a similar role at a Graduate School of Business at a Public Higher Education Institution. Golf has experience in providing management and leadership development solutions for different corporate and governmental institutions across various sectors.

**Hotel** is an Industrial Psychologist, and Systems-thinking specialist with business, strategic planning, and organisational development experience. Hotel has extensive experience in working with executives, teams, groups and organisations focusing on strategic direction, integration, thinking and action. Hotel has more than 20 years' experience in multiple organisations in both private and public sectors.

**India** is an executive manager with an specialist focus on Education Policy and Planning. India has a responsibility for Education Policy, Planning and Monitoring and Evaluation. India has senior management experience in multiple organisations, and has an broad educational background that ranges across Education, Mathematics, Computer Science, Psychology and Education Economics and Planning.

**Juliet** is an senior manager and practitioner with extensive experience in corporate and organisational strategic planning, monitoring and evaluation. Juliet has senior management experience in various organisations, with responsibilities of facilitation and coordination the development of strategic plans, and the monitoring of performance information and performance reporting. Juliet has 20 years' experience in multiple organisations in the public sector.

**Kilo** is the voice of the researcher with 24 years' experience in Human Resource Development, and management and leadership development within the Public Sector in particular. My experience ranges from the management of management and



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leadership development functions to the management of learning and development functions. I currently have the responsibility of developing management and leadership capacity across various public institutions where the “head count” is in the proximity of 160 000 people.

### **3.5 RESEARCH FINDING 1: DUAL CORES**

A notion of sustained cores surfaced from data. I make reference to dual cores in the light of data. These cores are the leadership and management systems within organisations. These cores interact with each other to form dual cores.

A leadership system appreciates the strategic environment, and articulates an organisational strategy. This leadership dynamic with the environment aims at long-term strategic sustainability. Decision-making in terms of the type of strategy, associated capabilities and culture required for the implementation is attributed to the leadership system. However, the implementation activity is attributed to a management system where the leadership system creates and informs adjustments to the management system, and invests resources in it. The leadership system is not excluded from implementation activity or the development of implementation capabilities. Interrelation between the cores consists of big- picture versus operational and leadership competence versus technical skills.

Disruption to the system’s interrelation arises in the absence of a leadership system that articulates capabilities and culture required for strategy implementation. This disruption eventually reduces and confines a development system within the management domain. Added disruption to the system’s interrelation is in the form of leadership systems that take precedence to internally directed decision-making with its allocation of resources according to short-term views of bottom lines.

Participant Delta has the view that “long-term strategic positioning comes from a sustained core in which one invests within the organisation.” Charlie holds that with appreciation of the organisational strategic environment the leadership system: “Puts in place a management system, and trains people in that.” Charlie highlights the leadership system role to establish and to adjust the management system “When they see that the environment shifts, they adjust the management system.” Hotel suggests

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leadership learning to determine resource allocation. “What is your environment like; competitors; collaborators; operational structure; business model? So where do you send your experts?” Thus the leadership system, as a core, aims at long-term strategic positioning, and invests in the management system, and adjusts or calibrates it on the basis of its understanding of the strategic environment. A proposed outcome from the interaction or interrelation is “long-term strategic positioning,” as suggested by Delta.

Echo illustrates this interrelation, albeit in development context. Echo maintains that the starting point for the development of leadership is not traced with operations. Echo states that leadership, the leadership system needs to articulate the “workforce capabilities, the culture and the type of strategy to be executed,” as well as the collective leadership capability required. This decision-making is attributed to the leadership system. However, that system is not excluded from either implementation activity or its development. Kilo considers the last mentioned implementation activity the focus of the management system. Echo argues that should the leadership system not be able to articulate the mentioned considerations the development system would be limited to the operational “fix what is broken.” Kilo considers the last mentioned a confinement of aims with development within the management system:

*Firstly, I want to understand the strategy. You see, the strategy is there, but is the execution there? You do not have to have done anything in execution; I am not interested in anything that does not impact my learning strategy. What does impact my learning strategy is actually what workforce capabilities you want to create...(Echo)*

A contribution by Foxtrot relates to the mentioned interrelation, which is an interrelation in decision-making. Foxtrot has the view that a capability to appreciate the strategic environment should exist. However this should be separate from the organisation or not absorbed within it. “A space in the organisation that can be receptive to indicators” is required. “If that core becomes absorbed into the organisation it will not hold enough objectivity. It has got to have some observing reality that brings in the check.” Hotel, in terms of a leadership system’s capacity to recognise skill requirements states: “How can they recognise the skills, because leaders do not do everything, but need to be aware of everything. So, they need to be out, but also in.” These contributions stress

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a receptive capability. This is, however, not absorbed in the organisation, which appreciates the organisational strategic environment.

An interrelation between the two cores, taken from a viewpoint from Delta, consists of big picture versus an operational one, and leadership competence versus technical skills. Delta has the view that:

*...leaders must do time in the organisation...They have the detailed understanding of the operational matters, but have also seen the larger picture, and were not appointed as leaders based on technical skills, but in consideration of leadership competence.*

Charlie asserts: "You need to have the ability to adapt to your environment, but you can only do that if your basis is somewhere..." An interrelation between operations and the larger picture, or strategic picture, is evident from Delta's view. It is, however, apparent that operational understanding and skill are not sufficient within the leadership domain.

The Duality is not necessarily a divide at an individual level. Duality exists, according to Charlie, within individual roles:

*We focus on leadership, people need to be good leaders with leadership characteristics but if you do not have the management skills that goes along with the leadership, and you do not have the capability to shift between the two roles...*

This duality considered in roles, in light of the above comments by Charlie and Delta, reiterates the interrelation between the leadership and management systems. However, provided the view from Delta concerning the requirement for leadership competence in addition to technical skills suggests possible separation of roles.

A last element to this theme is the possibility of the dual cores be disrupted. Charlie refers to a tendency of internal focus when:

*as soon as there are difficulties in the organisation, the country or economically and politically, the focus becomes internal,*

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*immediately. Then it is restructuring, downsizing, cost cutting, all focus internal...the bottom line is not what it should be...then we cut cost and downsize at the cost of sustainability...*

Delta has a similar view:

*If one considers restructuring, in my opinion, some organisations do that too much, they do that about every year whereas one would rather do it in periods of three to five years...I think that the real long-term strategic positioning comes from a sustained core in which one invests within the organisation.*

The above disruption provides a condition to the systems' interrelation. In terms of the restructuring theme, Kilo believes that, firstly, the leadership system or role takes predominance over internally directed decision-making in the allocation of resources. A second matter is that the leadership system timeframe to decision-making in the allocation of resources reduces such allocation where ideally it should be distant from short-term views of bottom lines. The view of Delta summarises this:

*It is a rhythm that we see. As soon as the environment gets difficult, and the organisation does not perform then an inward focus becomes natural first...more positive environment allows for more external focus.*

Foxtrot cautions as follows about balance:

*...the ability to hold the tension and to look at the warning signs for when you go too far to the one side or the other. It is not about staying there. Sometimes you need to go to the other side, but for how long before the other side moves completely into a downward swing or is neglected so completely so that you actually break down and have to start again?*

Contribution by Charlie brings together the matter of interrelation between the cores, the foci to the cores, and the effect of disruption. The leadership system commits to an organisational strategy and in interrelation with the management system,

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articulates capabilities and the culture required for strategy implementation. On-going disruption with predominant inward focus eventually reduces and confines a development system within the management domain:

*If you have a differentiator and you are committed thereto, then you can get to a sustainable competitive advantage, otherwise you just do things, and in any case it is replicated by competitors.*

I hold in summary, from the preceding points of view, that:

- Two cores, which form themes for themselves, exist within the organisation, and these cores are in interaction with each other to form dual cores.
- The cores are the leadership system, and a management system within organisations.
- As a core, the leadership system aims at long-term strategic positioning, and invests in, adjusts or calibrates the management system on the basis of the leadership system's understanding of the strategic environment.
- The decision-making concerning the type of strategy and the associated capabilities and culture required for the implementation activity is attributed to the leadership system. That system, however, is not excluded from either implementation activity or its development. The implementation activities to the organisation form the domain of the management system.
- The absence of the preceding point confines the development system within the management system.
- The interrelation between the two cores consists of big picture versus operational; and leadership competence versus technical skills.
- An interrelation exists between leadership and the management systems at individual level. However, there is a separation of roles.
- Disruption to the systems' interrelation is in the form of a management system that takes predominance over the interrelationship regarding internally directed decision-making in the allocation of resources. A leadership system timeframe is required for decision-making in the allocation of resources, which are independent of short-term views of bottom lines.

### **3.5.1 Consideration of extant literature**

I am about to consider extant literature I believe applicable to the research findings already laid out. This practice of considering extant literature will be repeated with all the research findings I report in this chapter. I first wish to place the reference to, or use of extant literature in methodological context.

Literature review during data analysis is permissible with grounded theory (Bloomberg & Volpe, 2008; Chiovitti & Piran, 2003; Suddaby, 2006; Thornberg, 2012; Mills et al., 2006). The theory development is based on categories derived from the empirical data (Bitsch, 2005). However, literature, regarding those emerging categories (Chiovitti & Piran, 2003) can be used for augmenting the emerging framework (Suddaby, 2006) of categories. Suddaby (2006) continues to assert that the researcher's use of extant literature, as interplay between data and literature, assists the researcher in lifting data to conceptual levels. It is for the afore-mentioned reasons of augmentation and interplay that I consider extant literature.

Literature shows that leadership is important to organisational performance (De Rue & Myers, 2014), as organisational leadership articulates and owns organisational strategy together with the associated strategic logic. The executive leadership and board are within a position of final accountability (Serfontein & Hough, 2011; Ungerer et al., 2016). The organisational strategy informs the coordination and deployment of resources in ways to achieve strategic goals (Hall, 1988; Kaplan & Norton, 2004).

Interrelation between the leadership system and the larger organisation is highlighted by Hall (1988). Hall (1988) presents a leadership system that integrates social and technical sub-systems with leader-imposed policy and cultural systems. This view, by Hall, goes beyond traits of effective leaders and effective job behaviour. It imbeds an integrative leadership system with a specific purpose with the organisation and wider context. Hall (1988) holds that the leadership system decisions constitute, manage and align other organisational sub-systems. Similarly, Van Velsor and McCauley (2004, p. 22) refer to the development of leadership; "...as the expansion of the organisation's capacity to enact the basic leadership tasks needed for collective work: setting direction, creating alignment, and maintaining commitment." An immediate conceptual implication to this interrelationship between a leadership system and the



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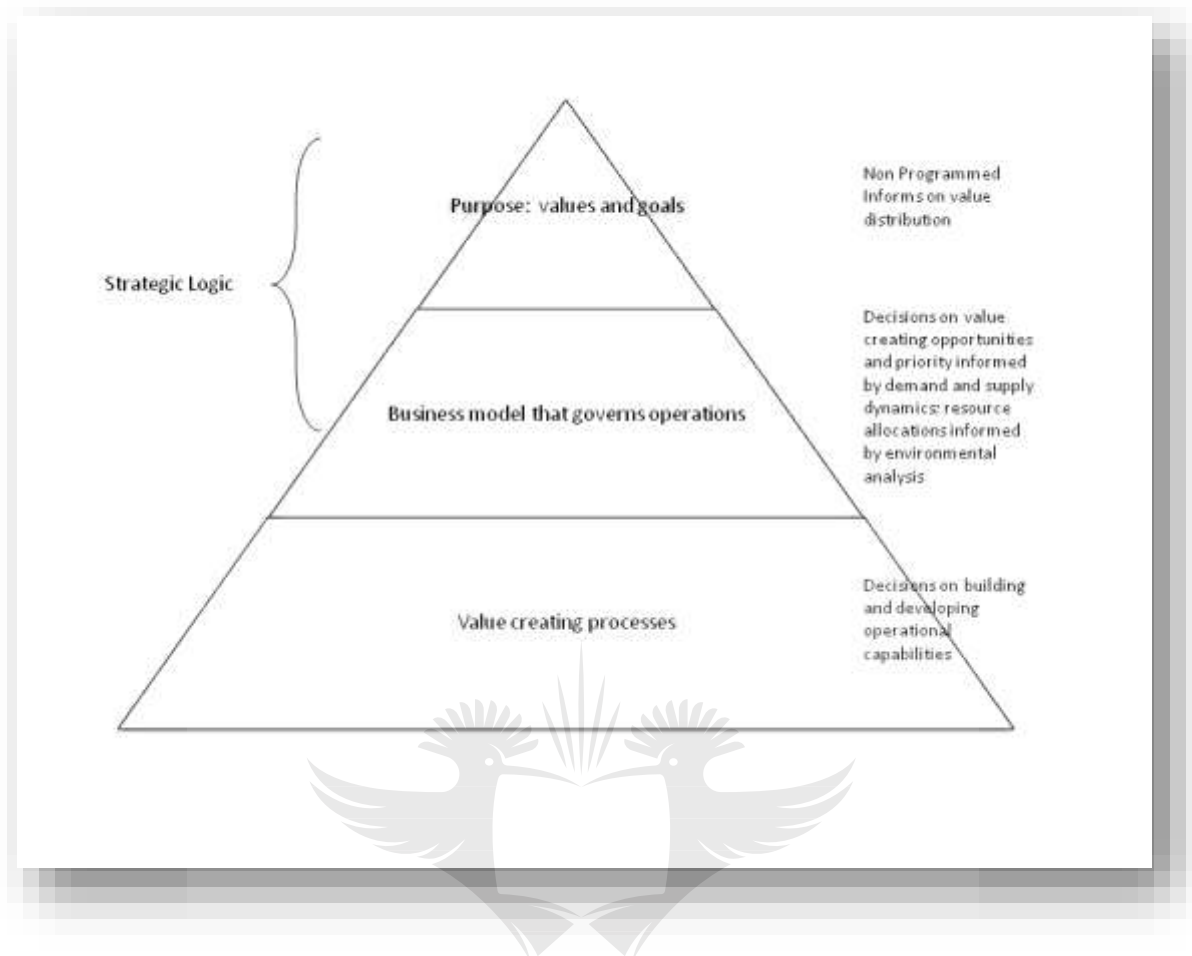
management context to the organisation is pointed out by Ungerer et al., (2016). They consider managers to be leaders, and that “leadership includes the practices of management” (Ungerer et al., 2016, p. 27).

Leadership, as it articulates strategy, provides a strategic logic to the organisation (Serfontein & Hough, 2011). The strategic logic, it is argued, informs the coordination and deployment of resources in ways to achieve strategic goals in the organisation’s competitive context (Hall, 1988). The strategic choices made, according to Ocasio and Radoynovska (2016), are informed by the logic or combination of logics the organisation commit to. This logic, or combination of logics, introduces organisational complexity and pluralism as context to organisational experiences (Ocasio & Radoynovska, 2016), I will return to the idea of complexity and pluralism at a later stage.

Wallin (2012), to the effect of the interrelation between leadership and management presents a conceptual view of an organisation. The organisation, provided this conceptual view, is divided into parts as presented with Figure 3.1.

The first part to the organisation is organisational purpose as the organisation’s values and strategic goals as illustrated with Figure 3.1. This is an outcome of non-programmed decision-making processes that informs the whole organisational system. The organisational purpose, its values and strategic goals, at the highest tier, informs decisions on value distribution. Value distribution refers to decisions as to who are major stakeholders are and in which order they are served; and how each stakeholder is served (Wallin, 2012). The higher tier to the organisation that focuses on purpose as values and goals, as well as value distribution relates to a view to organisational architecture by Ungerer et al., (2016). Ungerer et al. (2016, p. 37) make reference to a strategic architecture organisations, which include an element that reflects the organisation’s “core logic for creating value on a sustainable basis”. This element to the organisational architecture is not the same, as Ungerer et al., (2016) point out, to the element of business model: it is a more wide-ranging strategic description of the organisation with the business model mere a subset to the strategic architecture of the organisation.

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**Figure 3.1: Conceptual view of an organisation**

The second tier to an organisation, according to Wallin (2012), is the level of business modelling; refer to Figure 3.1 as illustration. This is a product of a programmed decision processes. The business model represents the value-creation element to the organisation. This element involves decision-making concerning value-creating opportunities and priority. Decisions are made, in light of purpose, with the use of analysis as, for example, supply and demand, and environmental analyses. This model governs resource allocation and operations in value-creating processes. Purpose and business model, combined, is considered as the strategic logic of the organisation (Wallin, 2012), or strategic architecture (Ungerer et al., 2016). Wallin, similar to Sanchez, suggests that strategic logic informs coordination and deployment of resources; and that the value-creating processes are planned and developed to render priorities of the business model.

An organisation as an open system is affected by changes in its environment (Schein,



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1988; Stacey, 1996). The organisational environment, or its strategic landscape, is the wide internal and external organisational context, and can be formed by “strategic actors”, with that context that influence options and choices (Ungerer et al., 2016). Selsky, Goes and Baburoglo (2007, p. 74) refer to environments with a casual texture, which is an “emergent property of the whole field and affects the behaviour of systems within it.” Environmental changes thus imply affects to leadership considerations in strategy and strategic logic (Serfontein & Hough, 2011).

Leadership imbeds a strategy perspective within the organisation, which in turn frames strategic options and choices to leadership (Selsky et al., 2007). Ungerer et al. (2016) make reference to two typical strategic postures, the first is to fit or adapt to the environment which is likely to be a following or reactive posture in many cases. The second posture is less concerned with the competitive environment, but continually seeks to internally reinvent itself. Further posture may be collaborative exploits within the strategic landscape, which goes beyond the aim to denominate a market typically associated with neoclassical strategy-making (Selsky et al., 2007). Strategy framed in collaborative exploits is likely not to consider customers as “recipients of value created,” but is active in creating value, and that requires new and different capabilities from the organisation (Storbacka, Frow, Nenonen & Payne, 2012).

The conceptual view to the organisation suggests interplays or interrelationships between the first, second and third tiers. The second tier, the business model, represents the value-creation element to the organisation, in light of the organisational purpose. Various options exist in consideration of value-creation. Literature points to leverage points available to leadership with Hazy (2006) who suggests five leverage points. The first two leverage points address the incremental increase effectiveness of the system within the environment. A further two leverage points are concerned with increases of variety or alternative possibilities available to the system. This implies considerations of new capability configurations and/or exploration of the external environment for new resources. Leadership in these cases, would pay specific attention to the flow of information in support of learning, experimentation and knowledge-sharing towards the development of internal and external possibilities, and the redirection of latent resources to possibilities identified and toward processes to develop new capabilities. The last point of leverage is the balancing of tension within

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the system to maintain an internal coherence. This is achieved through balancing risks related to all other points of leverage.

Sanchez (2012) provides a typology with three types of strategic environments together with four proposed forms of change being induced. Sanchez (2012, pp. 11, 17, 29) points to a Stable Environment where change is likely to be incremental improvement, an Evolving Environment that requires new approaches to coordinating current resources and capabilities where change is likely to be new interfaces and configurations, an Evolving Environment that requires new resources and capabilities where change is likely to involve new capabilities, and lastly a Dynamic Environment where the rate of change is high while the nature of change and capabilities required is uncertain, and where change is likely to introduce new capabilities and interfaces around alternative future scenarios.

The third tier to the conceptual view of an organisation (Figure 3.1), comprises value-creating capabilities that render priorities of the business model (Wallin, 2012; Ungerer et al., 2016). Becker et al., (2009) argue that capabilities form the basis to value. An organisational capability is the capacity to perform practices to provide a desired end by the use of resources across the organisation (Helfat & Peteraf, 2003). It does not refer to a single activity or the use of a single resource or process, but to patterns of activity that are collective, repeatable and imbedded. Organisational capabilities bring about reliable desired results, and its development requires more than individual competence (Helfat & Peteraf, 2003; Schreyogg & Kliesch Eberl, 2007; Meyer, 2010).

### 3.5.2 Summary to Dual Cores

I have set out with the preceding section to present literature that I found to relate to the Dual Cores category. I present, with this summary, my understanding of this thematic category, in light of empirical data and related extant literature.

I maintain that the leadership system, by appreciation of the strategic environment, articulates an organisational strategy but include refinements considering the literature.

I view the organisation in three conceptual tiers where the first two tiers, in particular, form a leadership core and theme. The leadership system considers the strategic

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environment and articulate, as to be explained below, the organisation strategy in a differentiated way across the organisational tiers. This tiered view, together the differentiated articulation of strategy, assists in illustrating disruption to the interrelation between the leadership and management systems.

There are, as suggested an interrelation between the conceptual tiers of the organisation. The first organisational tier articulates organisational purpose, a second tier articulates the business model and governs operations, and a third tier constitutes value-creating capabilities. The organisational purpose reflects values and strategic goals, and informs decisions on value distribution. The business model, the second tier, represents the value-creation element to the organisation, in light of the organisational purpose. Combined the purpose and business model tiers reflect the strategic logic of the organisation. The third tier presents value-creating capabilities that provide priorities of the business model (Wallin, 2012; Ungerer et al., 2016; Helfat & Peteraf, 2003).

The tiers are interrelated to form a whole. My interest is the interrelationship between tiers, where different emphasis to leadership and management qualities exists. Leadership consideration at the first tier is in context and in relation to a strategic environment. The strategic environment may be considered a causal texture, where actors within that strategic environment influence options and choices of other actors as the emergence of strategic decisions by self and other actors continuously shape the environment. This dynamic requires more from leaders than an accumulation of knowledge, skill, or competencies. It requires leadership capability in complex, systemic, strategic and interdependent thinking. The leadership system, at the strategic tier, recognises unfamiliar contexts and creates structure to enable understanding and appropriate innovation, but acts as an integrative core that integrate social and technical systems to form the larger system aligned to organisational purpose.

The leadership system at the “purpose tier” creates structure by articulation of values, goals and value distribution, and thereby adopts a strategic posture. A myriad of potential values, goals and priority to value distribution is possible. Literature presents, for illustration, three potential strategic postures. I consider strategic posture to be a

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strategy perspective held by leadership that frames strategy and the generation of strategic options and choices. The three potential strategic postures are:

- Fitting or adapting to the environment which in many cases is likely to be a following or reactive posture (Ungerer et al., 2016)
- Being less concerned with the competitive environment, and continually seeking internal reinvention.
- Focusing on collaborative exploits within the strategic landscape, which goes beyond the aim to denominate a market (Selsky et al., 2007)

These first-tier leadership system decisions inform the second tier, thus putting in place the second tier, and so on towards the third tier. The business model, the second tier, represents the value-creation element to the organisation, in light of the organisational purpose and strategic posture. This tier involves decision-making in terms of value-creating opportunities and priority, and shifts thereto. Various management techniques may be employed to determine value-creating opportunities and priority. Decisions concerning value-creating opportunities and priority frames resource allocation and operations in value-creating capabilities. Decision-making includes to the type of strategy levers, the associated capabilities and culture that are required. There are, as with the first tier, a myriad of management techniques and frameworks that can potentially be employed to define value-creating opportunities and priority. Literature presents, for illustration, five potential strategy levers. I consider a range of strategy levers to be typical options to create business value in light of organisational purpose and strategic posture. The five potential strategy levers, as deducted from Ungerer et al. (2016); Sanchez (2012); Selsky et al. (2007), and Hazy (2006), are the following:

- Making the most of current opportunities with incremental improvements to achieve efficiency within the system environment;
- Adopting new approaches to coordinating current resources and capabilities that amounts to new interfaces and configurations to be systemically more efficient and effective;
- Increasing the variety or alternative possibilities available to the system with existing resources, interfaces and/or capabilities;

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- Increasing the variety or alternative possibilities available by exploring new resources, interfaces and/or capabilities within or between organisations;
- Balancing tension between new capabilities or new capability configurations with the existing in light of alternative future scenarios.

The third tier presents value-creating capabilities that provide business model priorities. Capabilities are not single activities or the use of a single resource or process, but are patterns of activity that are collective, repeatable and imbedded. Organisational capabilities bring about reliable desired results, and their development requires more than individual competence (Helfat & Peteraf, 2003; Schreyogg & Kliesch Eberl, 2007; Meyer, 2010).

I consider the combination of Tiers 1 and 2, which provide the organisational strategic logic, the core to the leadership system. It aims at long-term sustainability with its values, goals and strategic posture. I consider the combination of Tiers 2 and 3, which govern, form and develop organisational capabilities, the core of the management system. A conceptual separation thus exists. The Business Model, as a common denominator or link between Tier 1 that forms purpose and shapes a causal texture by non-programmed decision-making, and Tier 3 that represents patterns of activity that are collective, repeatable and imbedded to bring about reliably desired results. These outliers represent the big picture and operational capacities. Thus, a duality exists between tiers and within tiers where different capacities are relied upon.

The absence of a core leadership system causes a disruption in the interrelation between leadership and management systems, and reduces and confines a development system within the management domain. The management system takes predominance over the interrelationship with internally directed decision-making in the allocation of resources. This is in contrast with a leadership system timeframe to decision-making, which is independent of short-term views of bottom lines. This duality can become lopsided to the management system should the longer-term perspective associated with the leadership system be replaced, temporarily or permanent, with a short-term, bottom line driven internally directed outlook and decision-making.

### **3.5.3 Conclusions to Dual Cores**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

A leadership system's endeavour to create structure is a central theme that arises from this category. Leadership as a system creates structure within often unfamiliar contexts. The environment may be considered as a causal texture where strategic actors affect environmental change. The leadership system's capacity in complex and inter-dependant thinking contributes with its effort to create from causal texture. A predominant strategic posture to the organisation results from the leadership system's undertaking to create structure. Predominant strategic postures may range between achieving organisational fit within and adaptation to the causal texture of environment. Internal reinvention may take place without much regard for the external environment and its texture; and lastly, organisational collaboration may exist within the strategic environment, and thereby be a direct causal actor (Ungerer et al., 2016; Selsky et al., 2007).

The view that the environment is a causal texture where strategic actors affect environmental change has two likely consequences, mitigated by the reliance the leadership system has on either, these are its capability in complex and inter-dependant thinking, and/or its accumulated knowledge, skills and competence. Reliance on a capability in complex and inter-dependant thinking presents an on-going variation to choices available to leaders as the causal texture develops.

The afore-mentioned capacity represents a first-tier leadership system's decisions that inform second- and third-tier decisions. The business model, the second tier, represents the value-creation element to the organisation, and involves considering value-creating opportunities and priorities. This consideration manifests in decision-making concerning business strategy levers, associated capabilities and culture. I consider a range of strategy levers to be typical options for creating business value in light of organisational purpose and strategic posture (Ungerer et al., 2016; Sanchez, 2012; Selsky et al., 2007; Hazy, 2006). These options are the following:

- Making the most of current opportunities with incremental improvements to



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achieve efficiency within the system environment;

- Adopting new approaches to coordinating current resources and capabilities that amount to new interfaces and configurations to be systemically more efficient and effective;
- Increasing the variety or alternative possibilities available to the system with existing resources, interfaces and/or capabilities;
- Increasing the variety or alternative possibilities available by exploring new resources, interfaces and, or capabilities within or between organisations;
- Balancing tension between new capabilities or new capability configurations with the existing in light of alternative future scenarios.

A third tier of consideration is the development and maintenance of the value-creating capabilities and required culture that provide priorities of the business model. Organisational capabilities bring about reliable desired results, and its development requires more than individual competence (Helfat & Peteraf, 2003; Schreyogg & Kliesch Eberl, 2007; Meyer, 2010).

I found that important descriptive elements to this thematic category are the following:

- Leadership system is an integrative core that establishes purpose, values, and goals by means of non-programmed decision-making. The Purpose, values and goals provide bases to choices to organisational strategic posture. It is assumed that the goal is to achieve long-term sustainability and can be considered to be achieved through independence from an environment as casual texture, alignment within an environmental texture, dominance of the environment, or collaboration within the texture without a view to domination.
- Leadership is an integrative system that creates structure within unfamiliar contexts. That leadership system's capability in complex and inter-dependant thinking frames consideration and selection of a strategic posture for the organisation is important.
- The leadership system's capability in complex and inter-dependant thinking frames the on-going variation to choices available to leaders as the causal texture develops. A leadership system's accumulated knowledge, skills and competence contribute to surface choices to be made, but as an input and not

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as a substitute to the leadership system's capability in complex and inter-dependant thinking.

- The leadership system that provides strategic posture causes business modelling and that strategic posture affect choices in business strategy levers and operational capabilities. The strategic postures can be in the form of shorter-term operational consideration of internally directed decision-making to fit or adapt to the environment, internal reinvention without much concern of external environment, or a longer-term and more complex posture in balance between internal and external views that seek opportunities for collaboration within the causal texture.
- Leadership as a core integrates social and technical sub-systems. It thereby drives organisational capabilities of strategic priority and organisational culture. The development of capabilities and culture is informed by strategic posture and is based on leverage mechanisms to the business strategy.
- Absence of a leadership system as integrative core provides the development of organisational capabilities and culture as management functions that are disconnected from organisational purpose, values and strategic posture.
- Disruption to the systems' interrelation is in the form of a management system that takes predominance to the interrelationship with internally directed decision-making in the allocation of resources. A leadership system timeframe is required for decision-making in the allocation of resources that are independent of short-term views of bottom lines.

### **3.6 RESEARCH FINDING 2: PURPOSING AND COWARDICE**

This is a theme that relates to purpose or meaning that arose from participant data. Participants related to the notion of purpose in societal, organisational and collective contexts. Data suggests that a process of learning takes place to understand organisational purpose and its significance of being. Kilo refers to this process as purposing. Purposing provides individual and organisational meaning. Purposing furthermore forms a basis to future-related leadership, organisational change and impact. The process brings together the organisational systems' significance within given realities of context. The learning process is furthermore not an organisational inward-looking process, but involves stakeholders in society. Purposing is inclusive. It



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is not a process of doing to society, but is being a learning part of society that culminates in an organisational role within society. The societal, organisational and individual meaning achieved by purposing lays a broader context to the organisational performance in light of reality experienced at a time.

Purposing is organisational and individually authentic. It involves a commonness and truthfulness, not merely amongst organisational leaders and members, but within society, less it manifests as organisational pathology. Hidden aspirations equates to organisational cowardice. Continuity in purpose, or on-going purposing, enables the long-term strategic positioning of an organisation. Purposing requires and provides sustained core in learning. It is a means of continuity for it to provide individual and organisational meaning. In a broader context, purposing provides context to the organisational performance in light of reality experienced at a time. There are, however, hidden reasons or aspirations that contribute to an organisational pathology. I tag this, a divergent element of hidden reason or aspiration, as corporate cowardice.

Participant Alpha makes reference to “significance of being, you have a role to play in society and humanity. Learn what you are to co-create in work realities.” Hotel suggests: “The leadership has to be clear on the values, values about what is the contribution for that business into a social context. I do not think business and social or community is separate.” Kilo suggests the “significance of being” to be purpose, but considers it as action, an on-going activity. Purpose as an action provides the element of learning with society as Alpha suggests. Becoming aware of significance of being, Kilo believes, is thus not an organisational object but a process of learning.

Alpha shares that purposing brings together the organisational system’s significance within given realities of context. Furthermore, in light of given realities, purposing results in clarity to a significance of being as a foundation to an on-going learning process. Purposing is not doing too society, but it is being part of society, and learning that culminates in a role within society. Golf suggests that:

*...to create the meaning, when today where we sit and have a discourse and the meeting of minds and different perspectives and philosophies on which we base our lives and value systems.*

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Hotel emphasises organisational engagement and integration with communities as a pivotal function of organisational leadership. He says:

*...what the business is contributing, how it engages and interacts to integrate is really important. And that is part of values and purpose. And leadership needs to hold that.*

Charlie stresses a requirement of meaning to leaders' impact, and a leadership system that makes future contributions: "But if you wish to be a leader that makes an impact, and that look at leadership as a system that will contribute towards the future – which has future-oriented meaning..." Impact and contribution is thus seen in light of organisational meaning. Alpha has a future-oriented view with the importance of vision, but also clarity thereto within, in particular, a volatile environment. He asks:

*Does the person have, in the volatile environment, enough vision? Do we do enough work in leadership development around visioning and clarity? Can we replace complexity with clarity? How much time is spent to clarify concepts to get everyone on the same page, and to get everyone to stay on the same page?*

Charlie continues with a view of the necessity of meaning when organisations adapt with environments. Kilo believes a basis of meaning should exist that propel future-oriented meaning. It is from that meaning that changes take place. It informs organisational and individual action. Charlie makes use of organisational values as an example to a thread of meaning to the organisation. He opines:

*You need to have the ability to adapt with your environment, but you can only do that if your basis is somewhere. For example, a major international company explains that their whole business is based on their values. This is a base that informs what you do, as individual as well as an organisation, and from that basis you can adapt to any type of environment in which you find yourself.*

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Hotel emphasises the importance of organisational purpose and values together with its significance to organisations and people as follows:

*I do not think you can set up a business if you do not know who you are and what the contribution of the business is, and from there you get some objectives. You get purpose, intention, objectives and then goals. But it has to come from purpose, values. And that gets operationalised in what is the long-term intention, the objectives and goals of the business. So business needs to be meaningful to a person, and that drops into what holds the people and business together. There needs to be meaning and purpose, we are using it in similar ways.*

Bravo places purpose or meaning in context to an individual in relation to the organisation with application to individual promotion. Bravo raises the issue of withholding information or being untruthful about purpose. This view, in one way, resonates with the earlier reference that meaning informs action. Bravo says:

*I have found that the pathology of organisations is in fact irritations that no one are allowed to talk about...and I worked with top management and argued that they all were corporate cowards because they withheld the truth for the purpose of promotion.*

Foxtrot shares a similar observation concerning unclear purpose, real and espoused purposes that are arguably not organisationally meaningful in the following way:

*Purpose? It is about meaning, it seems that power is the most important thing, what I can do, what can I get, how I be more powerful more wealthy; and meaning has dropped. How do I contribute to meaning and purpose, what is my meaning for existence. Accumulating wealth? If that becomes the meaning, what else is sacrificed?*

The view of Foxtrot resonates with Bravo. It does, however, suggest an individualised real and espoused purpose. For example: “power...what can I get ...how I be[come] more powerful, and meaning is dropped.” Thus, the cowardice is not merely about

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hidden reason for being present, but includes the hidden aspiration. Kilo is of the view that cowardice contrasts with the notion of purpose that brings together the organisational system's significance of the being within given realities of context.

The afore-mentioned contribution is conceivably at an individual level with a specific object of promotion, but presents a view of untruthfulness or cowardice. The organisational purpose is not real and shared with individuals and thus contributes to the pathology of organisations. Golf has the following view of independence that leads to a loss of community, and greater dependence on logical artefacts:

*I think with the advent of robotics and AI and the individual getting more and more independent from other human beings and more dependent on our logical artefacts I think we are losing the benefits of being a community.*

Alpha emphasises quality of being within a modern economy. This relates to the capacity to learn purpose and meaning as part of a community:

*How do I compete with a machine that can take over my work, unless I maintain human being? This may be what leadership development is in the future. Being, rather than the doing side, anything can do the doing.*

A benefit of community in purposing is conceivably the common meaning that is created, the inspiration provided by that meaning, and the opportunity that arises from focused action. Bravo suggests inspiration; "...you cannot motivate a person to work. You can only inspire that person to recognise why he should do it." Foxtrot expands as follows on quality of community: "The question of how you make meaning of something, from the heart, from a loving space, how can I truly empower and grow with someone else?"

Kilo holds the view that common meaning created in community allows for forward trajectory in thought and action. Delta refers to a sustained core, not as a basis only, but as means to continuity towards a long-term strategic position: "Long-term strategic positioning comes from a sustained core in which one invests within the organisation." This idea of a sustained core as means to continuity is with a common purpose and

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not merely a continuation in people. Hotel suggests: “The purpose and values is a key point. There has to be a reason.”

I hold, from the preceding points of view, that:

- Purposing results in clarity to significance of being is a foundation to a process of learning.
- Purposing is not doing to society, but it is being a learning part of society, and learning that culminates in a role within society.
- It provides meaning at societal, organisational and individual spheres.
- Purposing is a process of learning, and is not limited to an outcome statement. It provides context to individual and organisational performance provided current realities.
- The resultant individual and organisational meaning form a basis for future leadership and organisational change and impact.
- Purposing furthermore involves a commonness and truthfulness, not merely amongst organisational leaders and members, but with society unless it manifests as organisational pathology. Hidden aspiration equates to organisational cowardice. Purpose is organisational and individually authentic.
- Purposing does require and provide sustained core, a means of continuity, for it as organisational process towards long-term strategic positioning. Continuity in purpose enables long-term strategic positioning.

### 3.6.1 Consideration of extant literature

Purpose is equated to the organisation’s mission or vision statement as statement of purpose (McLean, 2005). Ernst and Young (2016) consider organisational purpose more foundational than vision and mission. It considers organisational purpose as a long-term, outward-focused reason for being, that is inspiring, and grounded in humanity. Ocasio and Radoynovska (2016), argue that organisational commitments in terms of values, assumptions the nature, aims, and role of the organisation relate to organisational mission and purpose. They furthermore add that organisations seek legitimacy to their mission, identity and competence in terms of external stakeholders and internal components.

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Kempster, Jackson and Conroy (2011, p. 318) ask, in “seeking to extricate purpose from its taken-for-granted, implied state”, whether vision and missions constitute purpose, alternatively whether “purpose implies a meta level meaning to a task – something of social value.” They remark that the “manifestation of societal purpose in leadership practice has been generally and regretfully overlooked” (Kempster et al., 2011, p. 320) The argument is presented that purpose in societal context emphasises purpose as “a worthy idea and activity”, with emphasis on personal intrinsic value. This argument is extended by reference to what is considered internally and external as “good” and the distinction thereto. External good is “winning status, obtaining money, or gaining power.” These are “extrinsic assets” (Kempster et al., 2011, p. 321). Internal good “is good for the whole community,” which facilitates a sense of connectedness to a societal purpose. Kempster et al., point out that leadership discourse in objectives, mission and vision, and the delivery activity thereto reflects transactional practices and process in production of external good. They argue a “purpose gap” in a decline of internal good with a contrasting growth in focus to external good that requires a leadership-led response of context and purpose of work that connect individual contributions with a greater societal purpose that is larger than the organisational goals in which they work.

Olivares (2008) highlights leadership and its development as the development of intentional and forward-looking, collective capacity. The importance of leaders that create purpose is described by Van Velsor and McCauley (2004). They present a view to a leadership process that is inclusive, and an ability to create shared meaning and work across boundaries. Van Velsor and McCauley (2004, p. 22), point to the importance of: “...developing individual and collective capacities to create shared meaning, to effectively engage in interdependent work across boundaries and to enact the tasks of leadership in a way that is more inclusive.”

Meaning is more profound than the purpose of today, according to Press and Goh (2018). Leaders need to deepen purpose to present meaning to individuals as users of products and services; the organisation purpose for tangible and intangible value-creation; and the larger society who are affected by the organisation’s purpose. Meaning provides an emotional connection with the future, which is important to stimulate on-going innovation within disruptive environments. (Press & Goh, 2018)



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The afore-mentioned broader view to organisational meaning is greater than meaning and associated strategy based on economic value alone. Traditional perspectives to organisational value-creation have its base in competitive advantage with “limited attention to other stakeholder expectations” (Ocasio & Radoynovska, 2016, p. 291).

However, the learning process to “learn what to co-create” is to manifest in different ways. Senge, Kleiner, Roberts, Ross, Roth & Smith (1999) refer to co-creating. Senge et al., suggest co-creating involves collective participation towards consensus. It requires time, but engenders commitment. This, according to Senge et al., is different to approaches of consulting or testing solutions. Another typology, built around stakeholder involvement, differentiates between communicating, listening, consulting, engaging, and partnering (Canada Health, 2007). Partnering entails the sharing of responsibility, and involves joint decision-making. Engaging involves deep deliberation amongst stakeholders’ issues that concern underlying values, and principles towards common ground. Consulting, in turn, involves discussion of decisions with stakeholders, whereupon decisions may be revisited by the organisation. Learning what to co-create, it appears provided the views from Ocasio and Radoynovska (2016) are not widely adopted. Ocasio and Radoynovska (2016) suggest that organisations are aware that relationships with customers, partners, and stakeholders are to be managed. Management is however limited to a receptiveness to the way in which those may affect the strategic goals of the organisation. Organisational goals, thereby, remain to be defined in economic grounds (Ocasio & Radoynovska, 2016).

Ernst and Young (2016) consider purpose as a long-term, outwardly focused reason for being. McGuire et al., (2009, p. 6) share a perspective to purposing as context. McGuire et al., (2009, p. 6) imbed culture to meaning. Culture, according to McGuire et al., manifests through the meaning people make of their environment. The meaning forms a gauge to goals, outcomes, and activity (Fairholm, 2009) The cultural meaning in purposing is thus a longer-term organisational context, within which the organisational strategy is to reflect an organisational purpose, bounded by the cultural meaning, but informed by the organisational strategic environment.

Literature illustrates organisational purpose as a key element to organisational strategy, together with the necessity for organisation strategy to be informed by

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organisational environment. It is within this light of environmentally connectedness that Lewis (2012) reiterates that organisations as environments become more complex, should be capable to respond, or deal with changes in organisation strategic environments for them to remain sustainable. This implies a process of learning and response, but not limited to organisational strategy making or operating to strategy implementation. McGuire et al., (2009, p. 6) highlight that, as the organisational strategies become more complex, the organisational culture needs to reflect, or grow, to reflect similar complexity. To this affect, Lewis (2012) maintains that leaders are agents of change in creating shared purpose, with a systemic perspective, organisational and environmental understanding, wider than the sector within which the organisation functions.

Selsky et al., (2007) argue that building shared meaning on the basis of shared values and deliberate collaboration is a means of dealing with turbulent environments. They hold that chains of reactive decisions and actions towards a potential competitive advantage often result in dysfunctional and unintended consequences. The premise to the argument of Selsky et al. (2007) is the view that the focal unit to strategic decision-making is an extended social field, which consists of diverse stakeholders with different interests. Organisations are part of complex social systems and contexts where decisions to norms, rules, or relational processes are negotiated or consulted. Strategic decision-making has an emergent effect on stakeholders, the environment and a long-term view of decisions and consequences is to be adopted. Sense-making is based upon collaboration and deliberation to adopt a whole system mental model. Storbacka, Frow, Nenonen, and Payne (2012) provide application to co-creation within volatile environments, which they refer to as an “outside-in” approach to value-creation. They argue that the centre point to value-creation is not within the organisation’s boundaries, but a product of co-creation by stakeholders in a network. Storbacka et al. (2012) and Selsky et al. (2007) illustrate views to the importance of actions to which I relate purposing within complex and turbulent environments. Thus, it is not necessarily purpose itself, but the meaning creating behaviour by leaders or purposing that creates a context to performance. This resonates with the view of Press and Goh (2018) that meaning is more profound than the purpose of today.



### **3.6.2 Summary to Purposing and Cowardice**

I have set out with the preceding section to present literature that I found to relate to category being discussed. I present, with this summary, my integration of extant literature with data to this category. I maintain with my findings from data that purpose is the significance of being. It is not considered an organisational object, but learning process to become conscious to significance of being, a process I refer to as purposing. Purposing provides individual and organisational meaning and context to performance. The associated meaning created through purposing is more than an economically rooted vision or mission statement, it is grounded in humanity and a long-term outwardly focused reason of being. Purpose is not merely defined by economic indicators.

Purposing, as a process of learning, brings together the organisational systems' significance, or meaning, within given realities of context. The learning process is inclusive, forward-looking, collective and driven by leadership. Meaning provides an emotional connection with the future, which is important to stimulate on-going innovation within disruptive environments (Press & Goh, 2018).

Purposing is organisational and individually authentic. It involves a commonness and truthfulness, not merely amongst organisational leaders and members, but within society, less it manifests as organisational pathology. Hidden aspirations are equal to organisational cowardice.

Purposing forms a basis to future-related leadership, organisational change and impact. The meaning achieved through purposing is more than context; it is an eventual collective culture that provides a measure to activity, goals, and organisational outcomes. The cultural meaning of purposing is thus a longer-term organisational context, within which the organisational strategy is to reflect an organisational purpose, bounded by the cultural meaning, but informed by the organisational strategic environment. It is within this light of environmentally connectedness that Lewis (2012) reiterates that organisations, as environments become more complex, and should be capable to respond to, or deal with changes in organisation strategic environments for it to remain sustainable. This implies a process of learning and response that is not limited to organisational strategy-making or

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operations to strategy implementation. McGuire et al. (2009, p. 6) highlight that, as the organisational strategies become more complex, the organisational culture needs to reflect or grow to reflect similar complexity. To this affect, Lewis (2012) maintains that leaders are agents of change in creating shared purpose, with a systemic perspective, organisational and environmental understanding that is wider than the sector within which the organisation functions.

My view to learning to co-create is that organisations deliberate with stakeholders on underlying values and principles towards common ground, seek consensus with stakeholders and partner with them.-

Various typologies exist that describe environments, their characteristics and the change they induce. Examples thereof have been highlighted within the previous section. Organisations, as environments become more complex, and need to assume strategic postures that it believes will bring about sustained performance. It is, however, important to stress the on-going quality to purposing, in deciding on strategic postures. These qualities to purposing are its inclusiveness and its, forward-looking and embedded place in society and humanity. These qualities are driven by leadership, and are not merely a process to define economic indicators. If this is the case, the organisation is reduced to managed operations, and is not a significant being within society. With time organisational strategic postures may become more complex, which in turn may require organisational meaning, and culture to reflect, or grow to reflect similar complexity. Continuity in purpose, regardless of the choices to strategic posture, enables the long-term strategic positioning of an organisation.

### **3.6.3 Conclusions to Purposing and Cowardice**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

Purposing as a leadership system function is a central theme that arises from this category. Purposing is leadership responsibility in organisational meaning-making. It is outwardly focused, inclusive and forward-looking, and it is a learning process that is grounded in humanity. Leaders are agents of change by creating shared purpose not merely within the organisation, but sector the organisational functions in and wider

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them. The expanded view to meaning-making is essential as the centre point to value-creation. It is not within the organisation alone, but is a product of co-creation by stakeholder networks within an extended social field. Purposing is organisationally and individually authentic. It involves a commonness and truthfulness, not merely amongst organisational leaders and members, but within society, less it manifests as organisational pathology.

I found it possible, as with the previous category, to lift important descriptive elements to this theme or category. The important descriptive elements to this theme or category are:

- The leadership system drives learning of purpose to achieve a shared meaning to the organisation. The learning is in interrelation with stakeholders within the organisational environment, and provides rationale for a strategic logic to the organisation. The purpose provides meaning for the individual within the organisation, and the organisation within society of stakeholders. This meaning frames a culture that forms a context to goals, activity and outcomes.
- Changes in environment bring about more complex business strategies that require larger capacity to function within a complex adaptive environment and organisational culture to reflect a complexity similar to ~~than~~ the organisational strategy.
- Purposing is a collective and forward-looking capacity. It creates meaning across boundaries, and lays a basis for inclusive leadership and interdependent work.
- Purposing is grounded in humanity, and has an outward-looking focus with an extended perspective of the environment. Meaning and organisational value may therefore be framed in usage value. The usage value is a co-creation by stakeholders within the causal texture.
- Purposing, together with its shared meaning. is a basis for an emotional interrelation between stakeholders and their future, and stimulates innovation.
- Purposing may be grounded in economic value with a primary concern of competitive relationships within the environment. A risk to purposing grounded in economic value is reactive value-creation, with potential dysfunctional or unintended consequences. The leadership system is hereby reduced to a

management system.

- Purposing can take forms of consolation as incremental process of testing and adaptation, by engagement towards a common mental model of the whole system in terms of values and principles, or by partnering on common ground in decision-making and responsibility.

### **3.7 RESEARCH FINDING 3: MAKING SENSE**

Making sense from the strategic environment, or sense-making, is a theme from data. Sense-making implies a connectedness with the environment. Apart from being consciously exposed to the environment, it implies organisational effort to understand the environment. Furthermore, it appears from data that a mere understanding of the organisational environment does not promise effective organisational strategy. It is suggested that a thinking capability to make sense is as important as content. Sense-making implies a macro-picture, and a capability for understanding the macro-environment by making use of various techniques that are dynamic and abstract. Contributions suggest inward- and outward-directed sense-making in collaboration with other leaders.

Alpha highlights a customary view that “knowledge is power”, but stresses that this is not applicable within today’s complex and fast-moving environments. “There is a paradigm issue in knowledge is power as it implies that knowledge is to be owned, and we move too fast for that.” Alpha argues the necessity to; “work with critical thinking skills rather with content” in light of fast-changing environments. This contribution suggests the thinking capability to make sense more important than content. Participant Golf reiterates: “Leaders need to learn to make sense far better than before, there are so much mess, so much fog that we need to try and make sense when we make decisions. It is not about the content...”

The significance of leadership sense-making is illustrated with a contribution by Hotel. Hotel emphasises meaning to leadership and its decisions and resource acquisition and allocation. Emphasis, with this contribution is the meaning to leadership by leaders: “How do you drive, land expertise, find, source and keep the expertise in the business, in areas of the business where it is supposed to be. It is also driven again by the meaning that the leaders put into leadership.”

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Delta suggests an awareness of environmental variables, even if there are no answers at the time: “How do people describe the context? Many times the context can be described vaguely, but it may be the awareness of the variables, there is not necessarily answers, but an awareness of the matters that we should remain aware of and should consider.”

Charlie provides a clue, with a view similar to that of Delta and Echo regarding the efforts leaders make to acquire relevant knowledge. Charlie points to deliberate efforts to make sense of the strategic environment with the use of various techniques:

*The board managed to continually consider the environment, they sought to be informed about the world landscape, scenario-planning, environmental analysis, to have insight into the direction the macro-environment adopts, where potential new markets are and what is going on in the country. You need to force yourself to do this.*

Echo provides “reference points” to sense-making from the environment, stating as follows the importance of an understanding to where the organisation is: “...I think the problem is that we want to develop learning architecture without actually understanding where the business is at.” Charlie, who already pointed to the importance of making sense, continues to stress that; “...leaders learn from the previous leaders, and made assessment of where the organisation is at the time, and what the environment demands from us now...” These contributions suggest, other than the potential collaborative element in making sense, a required commitment to sense-making as organisational inward- and outward-looking. Golf suggests that sense-making should be a broad process, considering a whole ecosystem:

*So if I do not understand how the world ticks I will not be able to manage anybody let alone myself. I think the system needs to ensure access to as broad a base as possible in order to understand the whole ecosystem.*

The assessment of “where the business is at” at that time and “what the environment demands from us now...” as a process of making sense implies a macro-picture as

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Golf suggested. Charlie suggests: “People adopted leadership roles, and showed insight, and they understood their macro-environment very well.” Delta illustrates the dynamisms and stresses the abstract nature:

*One can put processes in place, the nature of strategic work is so abstract, you can work on a project this year and the environment changes, and you let the project go and you do something totally different.*

A macro-orientation with an abstract nature together with dynamism potentially demands dynamism with thinking in the view of Kilo. This is suggested with contributions by Echo as “understanding where the business is at” and Charlie “where the organisation is at the time.” Bravo provides insight to patterns in thinking in presenting a difference between wisdom and skilfulness. “Knowledge and competence should eventually accrue to wisdom. But many persons do not achieve that, they are highly skilful.” Kilo suggests a difference in that wisdom brings different insights. Foxtrot has an opinion that contributes to ideas of skilfulness and wisdom with another insight:

*I think change is a challenging word itself, because I do not think people ultimately change. I think they become more skilful, they become more aware and more skilful and in them being aware and more skilful they are able to catch themselves and make a different choice in that moment because they now see that there are more options available. And if they do not have those options available they cannot stop their thinking that process and then there is just reaction, just repetition of learning, repetition of what I know.*

Delta provides an example of skilfulness and wisdom. Or, as Foxtrot expresses: “And if they do not have those options available they cannot stop their thinking that process and then there is just reaction, just repetition of learning, repetition of what I know.” Delta highlights differences to mastery of operations and proficiency to form vision in a purpose within a changing context:

*A technical manager has been appointed as CEO of an organisation*



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*and after two or three years the board indicated that the organisation was not changing in line with the strategic context. The operations flowed, but there was no insight as to where the organisation needed to be in future.*

Relating to thinking processes and seeing other options, Alpha suggests: “The need to provide alternative truths instead of providing boxes into which people need to fit. There is no box like the world anymore.” Foxtrot expands on thinking processes and worldviews that bring about alternative truths:

*However, if the application of that knowledge does not happen with a change in worldview or perspective so that you can see other options to apply that knowledge then the application of that knowledge will continue at the horizontal level.*

Delta points out that a mere understanding of the organisational strategic environment does not guarantee effective organisational strategy. “...we can consider the environment from x and y factors, but what would determine the strategy is the people’s capability that put together the strategy.” Making sense is thus not merely an organisational connectedness with its strategic environment by the application of multiple techniques, connectedness and making sense thereby manifest in people’s thinking capacity. Foxtrot suggests:

*You need to have a certain cognitive capacity to make sense and meaning of things otherwise...you stay in the concrete. There are people that are concrete and it is useful, when you start to get into a nuanced or to see an implication or an interpretation of it in a different way it can’t be seen. It is just not in the scope of being seen. And that provides a limitation to problem-solving and managing complexity.*

Delta has a related contribution to potential limitations to awareness of environmental factors, its impact on business and strategy. Whereas Foxtrot made emphasis to cognitive capacity Delta emphasises to the discretion people have in making decisions:



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*The capability to have the awareness of factors that would have a future impact on the business, and we make strategic long-term plans to prepare the organisation... It is important to really consider the discretion people have to make decisions. Levels of work are shifted down if there is no real discretion to make long-term decisions.*

The afore-mentioned contribution suggests that even though cognitive capacity exists to make sense of environmental factors, its impact on business, and in forming a business strategy, that capacity is moderated by the discretion people have in decision-making.

Alpha criticises practice in the development of leaders, when it comes to making sense of environments in strategy formulation:

*Most of the development is focused on the leaders as driver of procedural aspects, even in the domain of strategy: what models do we apply we make five-year plans which are too long. We do not assist guys sufficiently to cope with the uncertainty in the world, the fast changes.*

Foxtrot contributes to understanding Alpha's criticism, which relates to an earlier contribution of Bravo about wisdom:

*The usual way, the better I get to work to the norms and standards the more skilful I am. To get to different decisions given the same set of facts or circumstances, the fact that I come before is perhaps me being more wise or mature. That is a different type of development than being more skilful.*

Delta, on the practice of making sense, suggests the importance of identification of variables, and to assimilate of knowledge: "It is about assimilating, also to identify elements that can be of disadvantage to the organisation, how it may affect the business model, also to be aware of potential unintended impacts." Golf suggests a form of social learning: "How you develop that is by social learning, either anecdotally, story-telling. All these stories are to be critical to ways in which leaders make sense."

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Foxtrot suggests: “In developing leaders we have to have very different type of conversations, not courses that can be offered, but conversations about possibilities and constraints and context and observing, unusual ways of problem-solving.”

Delta makes reference to the need for strategic conversations to take place:

*The appreciation of the ambiguity and context is the foundation...how you manage strategic conversations that need to take place, and do those conversations happen...the nature of the work is ambiguous, uncertain.*

*I hold, from the preceding points of view, that:*

- Sense-making implies organisational effort to understand the environment.
- The leadership system’s thinking capability to make sense is as important as its content.
- Leaders make deliberate effort to make sense of the strategic environment with the use of various techniques.
- The contributions suggest inward- and outward-directed sense-making, albeit making use of various techniques, in collaboration with other leaders.
- Leaders assess, in making sense, the organisation in respect to “where the business is at” at that time and “what the environment demands from us now?”
- Sense-making implies a macro-picture, and this capability to understand the macro-environment remains dynamic and abstract.
- The “understanding where the business is at” and “where the organisation is at the time” are reference points with patterns of thinking.
- There is a difference between two patterns of thinking, namely, wisdom, and skilfulness.
- Understanding of the organisational strategic environment does not guarantee effective organisational strategy; moderators have cognitive capacity, and discretion people have to make decisions.

### 3.7.1 Consideration of extant literature

Schein (1988) explains that organisations, as open complex systems with dynamic

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interaction within environments, evolve and develop in their effort to perform tasks and to achieve goals. Ambrosini et al. (2009) argue that perception of the internal and external environments, the state of organisation success and resources, impacts decisions that affect value-creation (Ambrosini et al., 2009). Organisational change, according to Combe and Carrington (2015, p. 307) can be attributed to leaders that modify their “beliefs to accommodate the changes in the environment, or alternatively, the leaders themselves are changed.” The sense that leadership make from the environment is instrumental to the organisation’s effort to perform tasks and to achieve goals.

Various definitions that make sense can be provided for the phenomenon of leadership but there are multiple theories to sense-making, with different meanings attributed to it (Maitlis & Christianson, 2014). Major differences that exist are: The view that sense-making is an individual cognitive process where frameworks, schemata or mental models are used to place environmental stimuli, or socially constructed “...as a social process that occurs between people, as meaning is negotiated, contested, and mutually co-constructed.” (Maitlis & Christianson, 2014, p. 66; Combe & Carrington, 2015). Furthermore, sense-making can be considered retrospective in nature, or prospective or future-oriented.

Maitlis and Christianson (2014, pp. 66-67) point to common themes in various definitions of sense-making as: sense-making is dynamic or seen as a process; it is triggered by cues as confusing or unexpected events; with the overarching view of sense-making as social process, even though sense-making may be considered an individual cognitive process, as “thoughts, feelings, and behaviours are influenced” by others; and that it involves action to make sense and furthermore, people “enacts the environment that they seek to understand.” Maitlis and Christianson (2014, p. 67), with afore-mentioned observation, defines sense-making as: “A process, prompted by violated expectations, that involves attending to and bracketing cues in the environment, creating inter-subjective meaning through cycles of interpretation and action, and thereby enacting a more ordered environment from which further cues can be drawn.”

The sense-making process in leadership decision-making is described by Hockerts

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(2015) albeit from a cognition theory perspective. Hockerts suggests that prior experiences frame information processing, where these frames constitute knowledge structures, and are employed as mental templates in decision-making. Knowledge structures are organised as mental models based on the meanings made from past experiences, which in turn “guide identification, structuring and analysis of new data that enable interpretation...” (Hockerts, 2015, p. 107) Maitlis and Christianson (2014) place this individualised process described by Hockerts into social context as well as to contrast the individual with a social process. Individuals advocate, provided their process of sense-making, to “shape others’ understandings”; whereas an “inter-subjective meaning is constructed” as people engage and develop an understanding together.

Provided with the above descriptions to sense-making, I consider a diagnostic and cognitive skill necessary for skills in making sense. Hersey and Blanchard (1988) describe diagnostic skill as “understanding what the situation is now and knowing what you can reasonably expect it to be in the future” (Hersey & Blanchard, 1988, p. 5). Karhu (2017) suggests that cognition, in leadership context, is the assembly of knowledge structure that impacts problem-solving, the anticipation of future change, views to consequences of choices made, and behaviour. Cognition, according to Karhu (2017), is composed of cognitive models, beliefs, processes, and emotions that are referred to as mental models, or knowledge structures, cognitive maps, cognitive collages or world views. Karhu (2017) does, however, point out that knowledge structures or mental models include bias.

Stacey (1996) states that people simplify new information as construct simplifications or mental models. Menon and Yao (2017) point out that organisations within themselves, have the capability to revise mental models, based on observations not previously held. Leaders typically drive and/or control the process of organisational sense-making with advocacy to, or input from organisational members (Maitlis & Christianson, 2014). Inertia or organisational failure is often caused by, contrary to Menon and Yao’s view, a stability in leadership sense-making even though the organisational environment change (Combe & Carrington, 2015) Rationalisation as hinted to by Combe and Carrington is a risk to making sense. Rationalisation of new observations prevents processes to uncover new mental models. Ambrosini et al.

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(2009) argue that management perception of the internal and external environments, and the state of organisation success and resources, impact decisions (Ambrosini et al., 2009). Garvin (2005) suggests organisations acquire, transfer and change behaviour based on insights gained. The ability to uncover strategic options is reliant on the organisation's ability to identify, attain and apply new knowledge (Phelps, Adams, Bessant, 2007).

A matter of organisational capabilities is of interest because, as suggested by Grant (1991), it involves routines of production, or top management routines, which forms an organisational context to leadership cognition or sense-making. An organisation, in light of the resource based view to organisations, is considered constituted by configurations of resources and capabilities (Vesalainen & Hakala, 2014). Grant (1991) views a capability as routines or a network of interacting routines, where routines may range from routines that govern resources in production processes, or top management routines relating to business unit performance, and strategy formulation. Helfat and Peteraf (2003, p. 999) define a capability as "the ability of an organisation to perform a coordinated set of tasks, utilising organisational resources, for the purpose of achieving a particular end result." This form of view to the organisation, more specifically leadership's cognition of the organisations' capabilities, can in time, form a prevailing logic to the organisation (Vesalainen & Hakala, 2014).

Operational capabilities are routines making use of resources to bring about specific results. Dynamic capabilities are different as they do not directly contribute to organisational output, but, develop, join together and reconfigure operational capabilities and therefore influence organisational performance through their ability to change operational capabilities in light of changing environments (Grant, 1991; Rouse & Zietsma, 2008; Helfat & Peteraf, 2003; Vesalainen & Hakala, 2014; Kaehler et al., 2014).

A Reliance on a set of specific capabilities, within a continuously changing environment, may not lead to sustainable performance. Contemporary emphasis is on the ability to change, to quickly develop new capabilities as a means of sustaining performance, so-called dynamic capabilities (Schreyogg & Kliesch Eberl, 2006). A shortcoming according to Schreyogg and Kliesch Eberl (2006) is that existing patterns

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may inhibit change – a possible inability to change familiar ways of dealing with new environmental demands. Schreyogg et al. (2006) put forward three causes to this paradox as path-dependency, structural inertia and commitment. This potential dependency is, by definition, counterbalanced with an organisation's dynamic capabilities, which are considered a strategic ability uncover options in strategic reactions to environmental changes (Kaehler et al., 2014). Thus strategic logic and business model responses (Vesalainen & Hakala, 2014). The risk, however, is that required change is not forthcoming from leaders as change requires, first, a change to mental models (Dushkov, 2018). I view that operational and dynamic capabilities present a duality within the organisation. Kurthu (2017) considers duality as opposite activities whilst an organisation requires a capability to deal with dualities, a required ambidexterity. Management cognitive capabilities, in cognitive frames, sense-making, and analogical thinking are considered enablers in dealing with dualities (Kurthu, 2017).

To expand on the typology of capabilities Vesalainen and Hakala (2014) consider a hierarchy of layers to capabilities. The hierarchy, from the bottom up consists of assets, capabilities that are organisational-related outputs of coordinated assets, and organisational capabilities coordinated by business process and other that as capability integrate management activities (Vesalainen & Hakala, 2014, p. 939). Those layers are interlinked with dynamic capabilities that consist of coordinating and developing activities (Vesalainen & Hakala, 2014). MacLean, MacIntosh and Seidl (1995, p. 341), point out that the majority of theories concerning dynamic capabilities are based on "rational conceptualisations of action," based on economic rationality with behaviour considered "pursuit of utility." MacLean et al. (1995, p. 342) also make reference to a normative view to action as a contrast to the rational view, that are "concerned with the development and persistence of social, cultural and historical patterns in collectives, and with the shared cognitive and social structures, values and norms held by members of such collectives." MacLean et al. (p. 342) describe the first mentioned view to activity as "intellectually driven" and intellect, with the second view, surfaces the "deep values and norms underpinning actions which are socially constructed." MacLean et al., suggests that both views to action, in context of dynamic capabilities, are likely to be present within an organisation. The rational conception is



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likely to hold to the organisation as a whole, with the normative conception with organisational teams or groups. MacLean et al. do however suggest a conception of creative action as basis to dynamic capabilities. This is constructed with three elements, which are emerging intention, embodied expressions, and interactive identify formation. Emerging intention implies that people's interpretation of a situation, together with motivations to action, informs choices to action. Embodied expressions imply dispositions actors hold, based on an "earlier biography inscribed into his or her human body." Interactive identify formation implies the development of an "actor's identity" by interfaces within a social network. These elements, MacLean et al. (1995) suggest poise dynamic capabilities informed by situated interactions – by emerging intention, embodied expressions, and interactive identify formation – and not merely by one, or a combination of rational or normative views thereto.

Schreyogg and Kliesch-Eberl (2007) argue, as capabilities have path dependency and structural inertia, that change, in light of dynamic environment, has first to take place at levels higher than the affected capability; and that mechanisms to achieve dynamism should extend wider than focus on execution of routines as such effort to change will directly tie the change effort to the logic of the existing routines. Capabilities, according to Wallin, can be either higher- or lower-order system elements. The value-creation processes are considered the lower-order system element with associated (operational) capabilities of (a) maintaining relationships with customers that are referred to as relationship capability; (b) to design and deliver value – transformative capability; (c) to create new product performance – generative capability; and to deploy organisational and organisational addressable resources – integrative capability (Wallin, 2012). Business modelling, creating culture and coordination are considered higher-order system elements and are viewed as leadership capabilities.

A mental model is likely to be projected into the future with leadership system's planning (Magzan, 2012). Menon and Yao (2017) suggest that organisations may hold alternative mental models, track and compare the models in action to learn which provide "superior explanation" to events within their environment. Holding dual, or more, predominant mental models thus require the organisation, or at least a core group of leaders, to engage with the respective mental models. Karhu (2017, p. 77)



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refers to the capability to engage with contradictory but also complementary processes, simultaneously or sequentially, to improve practices incrementally and in parallel create new practices, as capability of cognitive ambidexterity. Ocasio and Radoynovska (2016) make a distinction between organisational complexity and pluralism in relation to the logics it commit too. An organisation's activity within conditions of pluralism, where it functions in different fields where relational patterns between logics exist and are established, experiences potentially dormant contradictions. This results with commitments to combinations of stable logics. Contradictions to logics may come to the fore in periods of transition, which introduces complexity. Complexity as experienced manifests with apparent incompatible organisational logics (Ocasio & Radoynovska, 2016).

Phelps et al. (2007) suggest learning states an organisation displays. These states range from a state of ignorance where the organisation is oblivious to the reality that it faces important issues; a state of awareness where the organisation becomes aware of one or more important issues; a further state where new knowledge is aggressively looked for, or passively received; and finally action based on the new knowledge. This staged process relates to a view by Rouse and Zietsma (2008) who suggest a trend that managers maintain with past models till a crisis brings about failure or radical change. Rouse and Zietsma (2008) attributes this phenomenon to the observation that capabilities become dominant logics, which filters stimuli and therefore prevents adaptation. Rouse and Zietsma (2008, p. 13) explain an adaptive process in light of dominant logics, which entails: (a) a disconnect between environmental signals and dominant logic and the ability to deal with the signals. This presents, according to Rouse and Zietsma; a failure to strategising; (b) deliberate cross-boundary learning that results with restrategising and new responses; (c) further deliberate cross-boundary learning and restrategising informed by stimuli received; and (d) development and institutionalisation of "routines for scanning, interpretation, organisation and strategising, enabling adaptive responses..." The above routines hinges on dominant logics, and organisational routines to be receptive to stimuli and to appropriately adapt. A risk exists in the leadership system's inability to change its existing mental models in the face of required change. Rationalisation of new observations prevents processes to uncover new mental models (Dushkov, 2018;

Menon & Yao, 2017). This learning may in strategy formulation may be limited to economically based responses and not addressing the organisational logics or mental models. Ocasio and Radoynovska (2016) argue that plurality and complexity in organisational environments demands fundamental consideration of value, and not merely a recognition of how stakeholders may affect strategic goals. This polarity and associated complexity require reconsideration of organisational purpose and its logic to value-creation. (Ocasio & Radoynovska, 2016)

### **3.7.2 Summary to Making Sense**

I have set out with the preceding section to present literature that I found to relate to category being discussed. I present, with this summary, my integration of extant literature with data to this category. I maintain with my findings that Making Sense implies a connectedness with environment. However, data suggests that the thinking capability to make sense is more important than content. Ambrosini et al. (2009) suggest similarly in that management perception of the internal and external environments impacts decisions that affect value-creation and distribution. Hersey and Blanchard (1988) refer to diagnostic and cognitive skill as “understanding what the situation is now and knowing what you can reasonably expect it to be in the future” (Hersey & Blanchard, 1988, p. 5). Karhu (2017) suggests that cognition, in leadership context, is the assembly of knowledge structure that impact problem- solving, the anticipation of future change, views to consequences of choices made, and behaviour. Karhu (2017) however points out that knowledge structures or mental models include bias.

Making sense requires organisational effort to understand the environment as a strategic landscape, with the organisation as reference point. The contributions suggest inward- and outward-directed sense-making, albeit making use of various techniques in collaboration with other leaders. Sense-making implies a macro- picture, and this capability to understand the macro-environment, whether making use of various techniques, remains dynamic and abstract. It comes forward from data that a mere understanding of the organisational environment does not promise effective organisational strategy. It is suggested that thinking capability to make sense is as important as content. I hold that a foundational knowledge structure or mental model

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is imbedded in the organisation, at the highest tier, provided the already mentioned conceptual view of an organisation (Wallin, 2012; Ungerer et al., 2016), that make up the organisational purpose, related values and strategic goals. This foundational knowledge structure influences leadership's sense-making of both its internal and external environments and affects Layers 2 and 3 of the organisation. Similarly to the view of Karhu (2017), I hold that organisational bias exists. As example of organisational mental models; Grant (1991) suggests that strategy, within a turbulent environment, is the best developed form of an organisational identity, or dominant logic, which is informed by the organisation's capabilities. The organisational strategy is thus, according to the afore-mentioned view, largely influenced by the dominant mental model concerning its organisational capabilities.

I believe more fundamental to the relative positioning of the organisation to its environment, reference points lie with patterns of thinking. The fundamental reference points are not content-related. The patterns of thinking are of skilfulness, and secondly wisdom. I view skilfulness as a concrete response formed on the basis of what is known. Wisdom, on the other hand, brings different insights. Different options are uncovered, as interpretations considered and consequences weighed are less concrete, which allows different choices to be made. Making sense is thus not merely an organisational connectedness with its strategic environment by the application of multiple techniques, connectedness and making sense thereby manifests in people's capacity.

Stacey (1996) states that people simplify new information as construct simplifications or mental models. Menon and Yao (2017) point out that within themselves organisations have the capability to revise mental models, based on observations not previously held. However, the rationalisation of new observations prevents processes to uncover new mental models. Ambrosini et al. argue that management perception of the internal and external environments, the state of organisation success, and resources, impact decisions that affect value-creation and distribution positions with the risk that resources may not be appropriately deployed (Ambrosini et al., 2009). Garvin (2005) suggests learning organisations acquire, transfer, and change behaviour based on insights gained. However, leadership's cognition of the organisations' capabilities can in time, form a prevailing logic to the organisation

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(Vesalainen & Hakala, 2014). A shortcoming according to Schreyogg and Kliesch-Eberl (2006) is that existing patterns may inhibit change – a possible inability to change familiar ways dealing with new environmental demands.

The risk, however, is that required change is not forthcoming from leaders as change requires, first, a change to mental models (Dushkov, 2018). Schreyogg and Kliesch-Eberl (2007) argue as capabilities has path dependency and structural inertia, that change, in light of dynamic environment, has first to take place at levels higher than the affected capability; and that mechanisms to achieve dynamism should extend wider than focus on execution of routines as such effort to change will directly tie the change effort to the logic of the existing routines. Rouse and Zietsma (2008, p. 13) explain an adaptive process in light of dominant logics, which entails: (a) a disconnection between environmental signals and dominant logic and the ability to deal with the signals. This presents, according to Rouse and Zietsma; a failure to strategising; (b) deliberate cross-boundary learning that results with restrategising and new responses; (c) further deliberate cross-boundary learning and restrategising informed by stimuli received; and (d) development and institutionalisation of “routines for scanning, interpretation, organisation and strategising, enabling adaptive responses...” The above routines hinge on dominant logics, and organisational routines to be receptive to stimuli and to appropriately adapt.

Menon and Yao (2017) suggest that organisations may hold alternative mental models, track and compare the models in action to learn which provide “superior explanation” to events within their environment. Holding dual, or more, predominant mental models thus require the organisation, or at least a core group of leaders, to engage with the respective mental models. Karhu (2017, p. 77) refers to the capability to engage with contradictory but also complementary processes, simultaneously or sequentially, to improve practices incrementally and in parallel create new practices, as capability of cognitive ambidexterity. I come to understand that a significant risk to the leadership system’s capacity is not necessary with the polarity on mental models. A risk exists in the leadership system’s inability to change its existing mental models in the face of required change. Rationalisation of new observations prevents processes to uncover new mental models.

### **3.7.3 Conclusions to Making Sense**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

A central theme to this category is the leadership system's capacity to make sense from its environment. The leadership systems capacity to make sense of its environment depends on the capability to gain insight and uncover new alternatives by moving beyond a dominant logic and/or by holding parallel, potentially competing dominant logics. There are three capacities, namely, a continuation of a dominant logic; moving beyond a dominant logic; and holding parallel, potentially competing dominant logics.

I found it possible, provided the central theme to this category, to lift important descriptive elements to this theme or category. The important descriptive elements to this theme or category are:

- A leadership system that is connected with its environment. However, the connectedness requires a thinking capacity to make sense from the environment. This thinking capacity impacts decisions to organisational purpose, values, goals, value-creation and distribution. Last-mentioned is reflected with the business strategy.
- The thinking capacity is a cognitive skill that enables appreciation of the current environment together with a realistic expectation of the future. The cognitive skills are practiced within a context of an existing knowledge structure or mental model. The existing mental model presents potential bias to problem-solving; future-oriented view and appreciation of perceived consequences to choices. This presents potential failure in strategising at any tier, and interrelation between tiers of the organisation.
- The leadership system's thinking capacity can be framed by a dominant knowledge structure and the organisational purpose, values and goals. Value-creation and distribution are likely to reflect the dominant model.
- The dominant knowledge structure is a reference point to the leadership system's sense from the environment. The leadership system's associated thinking capacity may result in either thinking patterns of becoming more skilful

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or wisdom. I consider skilfulness as a concrete response formed on the basis of what is known. Wisdom presents different insights with different interpretations, choices and consequences being uncovered and is less concrete than a response founded on the basis of what is known: skilfulness.

- The leadership system's associated thinking capacity in making sense from the environment is inhibited with the rationalisation of new observations, and thereby prevents processes to uncover new mental models. The existing patterns therefore inhibit change – a possible inability to change familiar ways dealing with new environmental demands. The leadership system's associated thinking capacity in making sense from the environment requires a capacity to change to knowledge structure.
- Dynamic environments may require organisational change. This change has first to take place in knowledge structure, at a level higher than the affected leadership system capability (Tiers 1, 2 and 3). The change effort, should the afore-mentioned differentiated change do not take place, would be tied to the mental model that drives current leadership routines that ends in becoming more skilful.
- Organisational change, based on leadership systems' wisdom, includes change in knowledge structure at a level higher than the affected leadership system capability, and wider than to focus on the development of an immediately affected Tier 3 capabilities.
- Organisational change in response to the environment can fail because of disconnection between feedback from the environment and the propensity of the leadership system to act on a basis of skilfulness or wisdom. Failure with leadership system responses may lead to more deliberate environmental focused learning and reconsideration of original responses, and thereby exposure to new routines of scanning and making sense of environmental feedback.
- The dominant knowledge structure is a reference point to the leadership system's sense from the environment. However, the leadership system may hold alternative mental models with associated different interpretations, potential choices and consequences being monitored and assessed to form different mental models.



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- The leadership system capacity to embrace alternative knowledge structures may lead to apparent contradictory but complementary change directed by the leadership system, but with the risk not in the apparent polarity to the alternative knowledge structures, but with a leadership system's inability to change its existing knowledge structure in the face of required change.

### 3.8 RESEARCH FINDING 4: A POINT IN TIME, OR TIME SERIES

Emphasis is placed on leadership learning in this thematic category. Contributions suggest the importance appreciating the organisation's past towards understanding its contribution to the future. This theme is related to Purposing and Cowardice, but has a different focus. Whereas the focus with Purposing and Cowardice was on purpose and meaning, the focus with this theme is learning from the environment. The data suggests that organisations need to "learn what you are to co-create in work realities." It furthermore suggests convergence in understanding the past and present to achieve a credible position for future-related co-creation. The contrary to convergence suggests as a divergence, which results in unsustainable leadership and an organisation focused on mere activity.

Charlie suggests a time series to learning that includes the past and future. Charlie has a view of an interconnected past, present and future, as aspect to a leadership system's learning:

*But if you wish to be a leader that makes an impact, and that looks at leadership as a system that will contribute towards the future – which has future-oriented meaning – you need to find your foundation in where you were, and how it has changed over time.*

This perspective considers the past and the current time extended to include a future-orientation that frames meaning. Hotel suggests a scope of leadership consideration. "Leadership is not a localised function; it really is a broad range of engagements." The system's learning is not limited to paths taken in the past, but with understanding of how change occurred. Knowledge of paths taken in the past, together with knowledge of how change occurred underpins future-oriented learning. This view is echoed by Golf. "If you do not understand what came before – you are on rocky firmament, in



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order to know what maybe needs to happen next.” A future orientation is thus dependant on an understanding of the current and past.

Delta presents an example of conflict to decision-making concerning future orientation:

*...tension between leadership, board and stock holders that wish to see profit returns where management may focus on investments for the future, to position the organisation.” This illustrates future orientation being considered, without common understanding of an inter-connected past, current and future.*

Charlie points to a consequence to conflict in the leadership system’s decision-making. This is decision-making where, according to the prior example, a common understanding of, and emphases to the past, current and future are not shared. Charlie suggests that lack of understanding results in mere negligible organisational activity:

*If you want to move forward in leadership and you do not understand where you come from and how matters evolved over time till where you are now, and from there to move forward. If that is not in place, I believe the future is not sustainable; you just do little things, a bit of this and a bit of that.*

The contributions from Charlie, Golf and Delta illustrate leadership system’s learning as inter-connected view, a common understanding of past, current and future. In addition, there is a common understanding that emphases be placed on the current and past. It is also understood that emphasis frame consideration of the future. Bravo highlights rationale for leadership system’s learning in terms of maturation and transformation:

*What is growth? It is on your way somewhere. It is transformative. What is that maturation? This meaning to transformation and maturation needs to be shared so that the executive leadership is part of the process.*

Bravo suggests a difference between transformative and maturation motives and that such a motive or rationale should be clear. Kilo understands maturation as an increase

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system capacity to a point of completeness or when considered to be established, and transformative towards a different system capacity.

*I hold, from the preceding points of view, that:*

- Leadership systems learn within realities from interconnected past, present and future considerations.
- The nature of learning extends with knowledge of how change occurred. This knowledge underpins future-oriented learning and organisation meaning.
- Leadership system's learning is an inter-connected view to, and common understanding of the current and past.
- A common understanding of emphases on the current and past is held.
- Consequence to divergence to the leadership systems' learning manifests in unsustainable leadership, where organisational activity is not focused, but engaging in mere activity.
- Maturation is a rationale for learning, which is an inert increase of system capacity to a point of completeness or considered established.
- Another rationale for learning is transformative towards a different system capacity.

### 3.8.1 Consideration of extant literature

Organisational learning is stressed by Matlay (2000) as a forward-looking posture to improve a collective capability to continually learn new and different ways. Fairholm (2009) suggests that learning provides current and future views grounded in organisational actions. The process of learning from, and within, changing contexts, as it is reported by Kutz (2008) relies on a leadership practice to view the current in light of both past experience and preferred future: "Awareness of the preferred future; Intuitive grasp and integration of relevant past events; and acute awareness of present contextual variables" (Kutz, 2008, p. 24). The practice and capacity to view the current in light of both past experience and preferred future is thus an essential element to strategic planning or thinking to create a future for the organisation.

Strategic thinking, argued by Fairholm (2009), is different from strategic planning. Strategic planning largely entails analysis, breaking down of goals into activities,

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attempts to predict, and to ensure organisational activity support organisational goals. Magzan (2012) holds the view that planning is, within a vast amount of organisations, a projection of current mental models into the future. It is mainly a how process, how are we to achieve organisational goals. Analysis and reason traditionally form the basis of strategy models, with the belief that a combination analysis, experience and insight provide reliable predictions of the future. This is a classic prediction paradigm that consists of a cycle of forecasting, planning and controlling. It is mainly content-driven and has a predominantly content orientation (Camillus, 1997). Differentiation does, however, exist between strategic planning and strategic thinking.

Strategic thinking is holistic and non-linear. It seeks to understand the why of a phenomenon, which leads to consideration of what can or cannot be a response, and thereafter how the response is brought about (Young, 2018). Strategic thinking is defined, by Muriithi, Louw and Radloff (2018, p. 2) as “a mental process which involves synthesising, utilising intuition and creativity to identify and solve problems.” Watkins, Earnhardt, Roberts and Rietsema (2017) consider the competences of pattern-sensing and adaptability important in complex environments. Cognitive characteristics important to strategic thinking are systems-thinking, creative and visionary thinking and holistic intuition (Young, 2018). The strategic thinking process, according to Fairholm (2009), has more to do with understanding relationships, leverage points, and desired outcomes than milestones, activities, and statistical analysis related to strategic planning. Fairholm adds that strategic thinking is ultimately based on purpose, meaning and values, which are more fundamental than goals and outcomes. Young (2018) considers strategic thinking as future-oriented thinking to create value to a system. Strategic thinking, together with the learning associated thereto, is considered a primary aspect to organisational change and performance in an environment of rapid change (Young, 2018). The cognitive abilities of leaders and organisational capacity in learning are drivers to strategic change, where leaders between organisations compete to “imagine, develop, and leverage organisational competences that both determine near-term competitive outcomes and shape the future competitive environments” (Wallin, 2012).

Jakubik and Berazhny (2017) refer to learning within business environments of industrial and knowledge/creative economies. Jakubik and Berazhny (2017) suggest

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that focus to knowledge within an industrial economy is mainly with the application of existing knowledge. Leadership's focus on knowledge within a knowledge/creative economy is with sharing knowledge, with the focus of being an enabler in creating new knowledge and innovation. Similar emphasis is made by, Phelps, Adams and Bessant (2007) who argue the importance of an organisations' capability to identify, acquire and apply knowledge that is required in dealing with new challenges. The matter mentioned concerning of sharing knowledge is entertained by Buchel and Sorell (2012). Buchel and Sorell suggest that even though leaders may be good at discovering new information, the typical organisational problem remains with the leadership capability to share and integrate knowledge with existing knowledge to inform new products or services. The organisational challenge, according to Buchel and Sorell, lies with the movement "from awareness to insight and action."

The capability to share and integrate knowledge with existing knowledge to inform a future is thus important; particularly in post-industrial economies. Minas (2005, p. 36) states the requirement in environments of complexity and low levels of certainty, to develop the capability to "generate creative adaptive solutions to new and emerging problems," Watkins, Earnhardt, Piitenger, Roberts, Rietsema and Cosman-Ross (2017) argue that complexity is treated, many a time, in reductionist ways where attempts to solve problems are in isolation to system context or environment. Watkins et al. (2017) suggest that leaders should move away from a view of predictability or linearity of environments, but should adopt a view of complexity. Last mentioned, according to Watkins et al. (2017, p. 150) requires leaders that "probe, sense and respond" in contrast with leaders that "force comfortable, but inadequate, solutions." This flexibility has a dependency on exploratory management and culture within the organisation (Sirati, Shokuhyar & Rezaeian, 2019).

Moving from reductionist ways to problem-solving arguably requires dynamic capabilities within organisations. Ambrosini et al. (2009) refer to dynamic capabilities in various forms that exist in both stable and dynamic environments. Similarity exists between the frame of Ambrosini et al. (2009) and that of Thompson (1998). Thompson makes reference to Continuous improvement, which is achieved when current paradigms are maintained. However, when new paradigms are adopted discontinuous change is to be achieved. It happens when drivers of change are substituted, and

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organisations are required to shift from a current capabilities to form new capabilities (Thompson, 1998). Camillus introduces the notion of a transformation paradigm. This view does not embody organisational redesigns in response to changes, but fundamental change, where the value and capabilities that support organisations' vision form a bridge in a state of discontinuity to shape or create the future (Camillus, 1997). Lavine (2014) suggests that leaders can promote creative alternatives, should they hold inconsistencies and seek to support, in complement, contradictory elements. Walker and Earnhardt (2015) suggest a need for leadership thinking that goes beyond that of economic success, but that includes ecological, social and organisational issues in a holistic fashion, with insight to interconnectedness of systems in light of the organisational purpose. This implies, according to Lavine (2014) that leaders equally attend to competing dualities in a balanced way, which ends with more possible responses. This duality is illustrated by Peterlin, Pearse and Dimovski (2015) who suggest leaders' attention to tensions in values, interests and power as these affect leadership decision-making. However, leaders need to be supportive to strategic decision-making at the same influence values, interests and power.

### **3.8.2 Summary to a Point in Time, or Time Series**

I have set out with the preceding section to present literature that I found to relate to the category being discussed. I present, with this summary, my integration of extant literature with data to this category. I maintain with findings from data that emphasises the leadership system's capacity to learn within a current reality, but with an interconnected past and future.

Data and literature point to the synthesis of past events and action, as well as the awareness of the current context and variables; together with an understanding of the preferred future. The practice and capacity to view the current in light of both past experience and preferred future is an essential element to strategic thinking for the creation of a future for the organisation. Differences do, however, exist between strategic planning and thinking. The difference, that I believe to be important, relates to the way in which a preferred future is conceptualised and planned for.

The leadership system's capacity to learn within a current reality, but with an interconnected past and future is not a mere process of strategic planning. Literature

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suggests a distinct difference between strategic planning and strategic thinking. Strategic thinking is considered holistic, non-linear and a process of synthesis. It considers root causes that lead to consideration of what can or cannot be responses. Emphasis is made to future-oriented thinking to understand with purpose, values and meaning as foundation, interrelationships, desired outcomes, and leverage points to create value for a system (Fairholm, 2009; Young, 2018; Dushkov, 2018), and strategic thinking as future-oriented thinking to create value to a system. Strategic thinking, together with the learning associated thereto, is considered a primary aspect to organisational change and performance in an environment of rapid change (Young, 2018). Strategic planning largely entails analysis, breaking down of goals into activities, attempts to predict, and to ensure that organisational activity supports organisational goals. It is mainly a how process. How are we to achieve organisational goals? Analysis and reason traditionally form the basis of strategy models, with the belief that a combination analysis, experience and insight provide reliable predictions for the future (Camillus, 1997).

Minas (2005, p. 36) states the requirement, in environments of complexity and low levels of certainty, to develop the capability to “generate creative adaptive solutions to new and emerging problems.” Watkins et al. (2017) argue that complexity is treated, many a time, in reductionist ways where attempts to solve problems are in isolation to system context or environment. Watkins et al. (2017) suggest that leaders should move away from a view of predictability or linearity of environments, but should adopt a view of complexity. Last mentioned, according to Watkins et al (2017, p. 150) requires leaders that “probe, sense, and respond” in contrast with leaders that “force comfortable, but inadequate, solutions.”

Data suggests, by learning, an inter-connected view to the current and past, and a common understanding of them. Furthermore, a common understanding of emphases to the current and past is stressed. The operative element to the afore-mentioned statements is a common understanding of knowledge. Leadership’s focus on knowledge within a knowledge/creative economy is with sharing knowledge, with the focus of being an enabler to create new knowledge and innovation (Jakubik & Berazhny, 2017; Phelps et al., 2007; Buchel & Sorell, 2012).



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Data suggested a different rational or logic to leadership system's learning. This is maturation that is an inert increase of system capacity to a point of completeness or considered established; or transformative towards a different system capacity. I find a relation within literature to these rationales. Learning towards maturation, I argue, entails activity associated with typical classical prediction strategic planning, namely, analysis, breaking down of goals into activities, attempts to predict, milestones, activities, and statistical analysis, predominantly a content orientation, a projection of current mental models into the future. This may result in continuous improvement or even break through changes, but within the same business paradigm (Fairholm, 2009; Magzan, 2012; Camillus, 1997; Thompson, 1998). An on-going risk is that the leadership system will "force comfortable, but inadequate, solutions" (Watkins et al., 2017).

Transformative learning towards a different system capacity implies finding future-oriented business solutions and simultaneously entering a different business paradigm. Transformative learning, I argue, entails holistic and non-linear thinking; based on purpose, meaning, and values; the understanding relationships, leverage points, and desired outcomes; understanding root causes to probe what can or cannot be a response; the use of current capabilities that support organisations' desired outcomes as bridges in a state of discontinuity, and in a process to shape the future way the organisation creates and extends its value (Young, 2018; Fairholm, 2009; Thompson, 1998; Camillus, 1997; Watkins et al., 2017).

Becoming more skilful is evidently being "on your way somewhere." However, transformation requires a measure of wisdom or different insight. There is a distinction between growth as a static increase of capability or competence being more skilful, and growth as transformation though greater wisdom or different insight.

### **3.8.3 Conclusions to a Point in Time, or Time Series**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

This category suggests leadership system learning, and its resultant effect on the larger organisational system, to be either about maturation or transformation of the



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leadership system. The learning takes place within a current reality with a remembered past, and in light of future aspiration.

It is possible, as with the previously discussed categories, to lift important descriptive elements to this theme or category. The following are important descriptive elements to this category:

- An important element to a leadership system's learning is its capacity to synthesise awareness and understanding of past events and action, current contextual variables, with a preferred future. This preferred future is framed by the organisational purpose, goals, and values-purposing.
- The logic to leadership system's learning may be either maturation, transformation or a combination of these. Maturation is an inert increase of system capacity to a point of completeness or considered established; or transformative towards a different system capacity.
- A transformative logic relies on insights, or a leadership system's wisdom not to consider a future to be a continuation of the past. Maturation logic places emphasis on mastery of previously mental models, patterns of interaction and activity. The core to maturation is insights gained from experiences and the use of those as basis to future predictions.
- A common understanding of emphases on the current and past are understood. Divergence to the leadership systems' learning manifests in unsustainable leadership, where organisational activity is not focused, but engaging in mere activity.
- The leadership system learning can be differentiated to learning in purposing, learning that brings about a business logic or model, and learning that brings about business operations.

I see an interrelation between this category, and the category Purposing. It became clear, with the discussion, that Purposing entails a learning process. The learning process has a specific aim to bring about purpose to the organisation. The interrelation is located with the outcome from Purposing. A common organisational purpose contributes to a convergence in meaning, which in turn mitigates the risk of divergence of cognition with A Point in Time, or Time Series.

### 3.9 RESEARCH FINDING 5: CHOOSING DOORWAYS

The data suggests that development systems have different entry points or Doorways to an organisation. I present different Doorways as an emerging theme, with the knowledge that each Doorway has a predominant participant voice. I hold the view that, even though the respective Doorways have predominant voices, the collection of Doorways is a substantive theme that reflects of entry points of the development system to the organisation.

Data suggests different points of entry by a development system to the organisation. I introduce with this theme those entry points of a development system to an organisation, which I refer to as Doorways. My intention is to present different Doorways without arguments to the superiority of one over another. My understanding is that the use of any one or combination of these Doorways presents a unique interrelationship between the developmental system and the organisation. I present my understanding to each of the Doorways, and its interrelationships with the organisation. I have identified four Doorways from data, and these are:

- An Authenticity Doorway
- A Strategy Doorway
- A Structural Doorway
- An Individualised Doorway

#### 3.9.1 Authenticity Doorway

An Authenticity Doorway places emphasis on authenticity within the organisation. The absence of authenticity results in corporate numbness. Authentic deliberation on issues brings about change, whereas managers and leaders may require support in the practice of authentic deliberation rather than training. Authenticity is considered a prerequisite for other training or development.

Bravo shares views that I tag as an Authenticity Doorway. Bravo suggests that in many cases training and development are not solutions, but "...counselling in authenticity. We are enslaved by, or addicted to corporate numbness. Get hold of the irritations, it informs your agenda." I consider authenticity important as it is a conditional context for

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deliberation and subsequent development. Attempts to identify development or training needs, as Bravo suggests, is of little value, unless “irritations no one are allowed to talk about” are addressed collectively. “You will, should you take excellent material into a toxic environment, only make the toxicity thicker. First purify the place.” India suggests little utility to development effort where leadership in a context where a leadership climate of fear is an irritation no one talks about:

*“To me, leadership is about influence and not in creating a sense of fear... You are just walking in the park, no one is following you and you are also wasting the resources because you can train us ten times but for as long as you have not actually opened up our mind and made us see that thing [vision] that you are seeing you are wasting your time. Even people with good leadership skills end up being lamed because of a hostile environment and influences from everywhere.”*

Failure to address authenticity results in organisational pathology, whilst success in addressing matters of authenticity sets the stage for “authentic renewal”:

*I have found that what the pathology of organisations is, is in fact those irritations no one is allowed to talk about. I worked with top management and argued that they all were corporate cowards because they withheld the truth.*

The contribution from India provides a descriptive account of pathology playing out.

*If you function in a culture of fear, where you are seen in suspicion, or seen as not to have the interest of the organisation in mind at all times than that is where the problem comes.*

I consider authenticity as, provided the viewpoints from Bravo, contributions by leaders that are truthful to its base motive. Bravo uses two significant phrases: “addicted to corporate numbness” and “counselling in authenticity.” I view addiction to corporate numbness the condition that arises when leader contributions are not truthful to base motives. The persistence thereof renders organisational deliberation of no organisational strategic value. It is a corporate numbness. Bravo considers counselling

in authenticity as a means of “organisational purification”, which precedes any attempt of organisational renewal or development. The view from Bravo presents, in essence, a development system choice that deals with authenticity as a precondition to development and renewal as required, or ignore issues to authenticity at the cost of significant development or renewal.

### **3.9.2 Consideration of extant literature**

Authenticity is considered as knowing yourself and accepting and maintaining yourself as you are (Dimovski, Ferjan, Maric, Uhan, Jovanovi & Janezic, 2012). Novicevic, Harvey, Buckley, Brown-Radford and Evans (2006, p. 73) consider leadership authenticity as the “leader’s moral capacity to align responsibilities of the self, to the followers, and to the public in efforts to sustain cooperative efforts within and outside of the organisation.” This process may permeate through an organisation and stakeholders would recognise a climate of authenticity that becomes part of the organisation’s identity.

The importance of leadership authenticity is described in literature. Munyaka, Boshoff, Pietersen and Snelgar (2017) argue a positive relationship between authentic leadership and team commitment, a positive psychological climate, and “the willpower to pursue goals and the ability to generate ways in which goals can be achieved” (Munyaka et al., 2017, p. 8). Coxen, Van der Vaart and Stander (2016, p. 10) found that authentic leadership “influences trust in the organisation and trust in co-workers, which then influence employees’ willingness to exert additional effort.” Kotze and Nel (2017) make the argument that authenticity in leadership has a consistency effect on leadership, as behaviour remains consistent to values and is not adapted to suit the situations. Authenticity is furthermore not limited to a style of leadership, as the leadership style and authenticity may exist regardless to style (Covelli & Mason, 2017).

Takala and Pynnonen (2013) make reference to destructive leaders who pursue their own interests ahead of the interests of their organisations, where in many cases an authentic front is under-laid with a self-interested core. A different perspective to a self-interested core is provided by Novicevic et al. (2006). They make the argument that personal values and organisational values may not be aligned, and therefore the maintenance of authenticity is difficult and likely to be replaced by tension, and leaders

are not likely to be authentic. This tension, according to Novicevic et al. (2006, pp. 70-71) may manifest with indifference, withdrawal, avoiding personal responsibility, and attempts “to dissociate from the organisational reality.”

I sense an interlink that provides a moral perspective with ethical conduct. It is with the last mentioned that leaders at higher levels impact the facilitation of ethical culture at lower levels, directly or indirectly as role models (Schaubroeck et al., 2012; Brown & Mitchell, 2010). Advancing ethical culture is not limited to the interrelationship between a leader and direct followers the modelling affect stretches further and differently. The effect of lower-level ethical leaders on their peers is conditional to the perceived ethical leadership at higher levels (Schaubroeck et al., 2012).

### **3.9.3 Summary to an Authenticity Doorway**

An Authenticity Doorway places emphasis on authenticity within the organisation. The absence of authenticity results in corporate numbness. “Failure to address authenticity may result in organisational pathology, whilst success in addressing it sets the stage for renewal” (Bravo). Provided the viewpoints from Bravo, I consider authentic contributions by leaders that are truthful to its base motive. Literature considers authentic leadership as leadership behaviour enacted on the basis of personal values and convictions, to achieve credibility, respect and trust in building networks of collaborative relationships. This process may permeate through an organisation and stakeholders would recognise a climate of authenticity that becomes part of the organisation’s identity. Novicevic et al. (2006, p. 73) consider leadership authenticity as the “...leader’s moral capacity to align responsibilities of the self, to the followers, and to the public in efforts to sustain cooperative efforts within and outside of the organisation.”

Authentic deliberation on issues brings about change, whereas managers and leaders may require support in the practice of authentic deliberation rather than training. Authenticity is considered a prerequisite for other training or development. I view corporate numbness the condition that arises when leaders’ contributions are not true to base motives. The persistence thereof renders organisational deliberation of no organisational strategic value. This is corporate numbness. The view from Bravo presents, in essence, a development system choice that deals with authenticity as

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required as a precondition to development and renewal, or ignores issues of authenticity at the cost significant development or renewal.

### 3.9.4 A Strategy Doorway

Another doorway I identify is the Strategy Doorway described by Echo. It suggests that the development system may enter the organisation in either strategic or operational interface. Echo places emphasis on a strategic entry point, which is not associated with the organisational operations per se. Priority to the leader development system, with entry, is to figure out and articulate organisational values, the culture the organisation wishes to enable, collective leadership capability required, competencies and behaviours required in light of the strategy to be implemented.

Echo provides insight into the development of systems' entry into the organisation in terms of the strategic and operational components. I therefore consider that strategic and operational interfaces exist between a development system and organisation. The view is that, by Echo, the strategic entry point is the key entry point. I refer to this choice of entry as the Strategy Doorway. Echo holds that for the immediate priority the entry point is not associated with the operations per se. At entry the priority to the leader development system is to figure out and articulate organisation values, the culture the organisation wish to enable, collective leadership capability required, competencies and behaviours required in light of the strategy to be implemented.

*“Because you are asking me to produce a leader, I want to know what type of leader do you want, that must be able to execute which type of strategy” (Echo).*

Deliberation of a leadership strategy (that consists of the afore-mentioned elements) is a prerequisite in terms of organisational strategy to actively create a leadership development system.

*“You see, the strategy is there, but the execution is not there. You don't have to have done anything in execution. I am not interested in something that does not impact my learning strategy.”*

Echo maintains that the absence of the leadership strategy, results in a development



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system limited to “fix what is broken” with the potential incidental outcome of “the right type of leader.” According to Echo deliberation on the mentioned elements to a leadership strategy is “one of the most complex things for top teams to do.” Echo states: “...if the top team of the organisation cannot articulate the long-term leadership strategy we should not attempt learning architecture.”

This doorway represents a choice to allow the leadership development system’s entry at either strategic or operational levels. Entry with a strategic interface creates a development system that deliberately develops leaders in capacities espoused in light of the organisational strategy. The mentioned capacities refer to the existing elements of a leadership strategy. Entry with an operational interface brings about a development system that is organisationally and contextually relevant, but is framed to “fix what is broken.” The entry point or interface leaves a choice. However entry at a strategic interface demands senior leadership’s participation. Data indicates the requirement of senior leadership’s participation as more than a system response to a gap, but as an articulation of future leadership requirements in light of strategy. leadership of organisations

### **3.9.5 Consideration of extant literature**

It is well documented that human resource development practitioners seek to align development systems with organisational strategy and its implementation (Becker & Huselid, 2006; Lawler III & Mohran, 2003; Moore, 2004). The requirement for this practice of alignment was described by Porter (1985) who emphasised that different generic strategies required different skills and cultures for success.

A needs analysis is a typical mechanism to use for creating alignment. Leskiw and Singh (2007) explain that needs assessment is a development practice for ensuring that the development system objectives are linked to the overall organisational strategy and, secondly, to single out effective behaviour and the identification of gaps compared with the ideal. Luoma (2000), in this context, refers to needs-driven HRD with its link to strategy formed on its ability to assess potential skills gaps. This informs subsequent intervention, whilst its strategic value rests with the ability to single out the strategically most significant gaps. Learning is thus ultimately used to close skills gaps as the organisation embarks on strategy implementation (Luoma, 2000).



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The importance of a full integration between the development and business systems is illustrated by Ulrich and Smallwood, Van der Merwe et al. (2012), and Becker et al. Ulrich and Smallwood (2007, p. xi). They hold a similar view that a focus on leadership competencies as a typical foundation to development, presents limitations as these mainly focus internally on the organisation, and in many cases do not include external expectations. Van der Merwe et al. (2012) state that together with increasing demands on leadership role, increases in the level of complexity that leaders face are not always reflected in competency models. Becker et al., (2009) argue that focus should be placed on the manner in which employees drive strategy execution and value, where strategic capabilities form the basis of strategic value and a rationale for a value chain as it drives organisational performance. This they say would provide a shorter and clearer “line of sight” between strategy and strategic success.

Buller and McEvoy (2012) provide a perspective to linkage that includes three levels of analysis where (a) organisational capabilities and culture form a basis, upon which (b) group competences and norms, and (c) employee skills, motivation and opportunity are built. Luoma (2000) makes reference to a “capability-driven development” approach that focuses on behavioural patterns, as a combination of skills and abilities of various people within a specific organisational environment. Luoma (2000) furthermore references “development driven by opportunities” that does not focus on internal deficiencies or needs, but is directed at taking advantage of opportunities for development informed by matters from outside the organisation. Such development may aim, according to Luoma, at developing new abilities or patterns of behaviour that contribute to current efficiencies and also future competitiveness.

Pasmore (2011, p. 5) makes reference to a concept of leadership strategy, and defines it as an explicit articulation of the amount, kind, skills, individual and collective behaviour required in leaders for the organisation to achieve success. Pasmore suggests that leadership strategies are developed, similar to organisation strategy, by means of a comparison of the current in terms of a desired future. This leadership strategy precedes a leadership development strategy, which is essentially a functional strategy to bring about that desired future. The significance of a leadership strategy in relation to a leadership development strategy is illustrated with the observations of Reichwald, Siebert and Moslein (2005) who comment on maturity of leadership

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development systems. Reichwald et al. (2005, p. 194), from a leadership development system perspective, provides a “three-step maturity model” of leadership systems. The first is characterised by a quantity of tools, instruments and sub-systems in support of leaders and leadership development. The tools are optimised for their use, however, with the risk that it loses sight and integration with a larger system outcome. The second maturity level is cognisant that the leadership development system is supported by an integrated array of tools that is focused on the use of a limited number of instruments together with efficient processes. However, the leadership development priorities, or topics, are not considered a priority and the leadership development system therefore functions as a parallel, and is disconnected from the business system, in particular from the overall strategy, structure and culture. A third level of maturity is characterised by integration and alignment between the leadership development system and business system with a fit or alignment with strategy, structure and culture. A further characteristic of the leadership development system, according to Reichwald et al. (2005) is that the system seeks to balance support to both stability and change with the organisation’s ability to learn and change, whilst the system is simple, efficient and clear.

### **3.9.6 Summary to Strategy Doorway**

This doorway represents a choice to allow the leadership development system’s entry at either strategic or operational levels. A Strategy Doorway is a strategic interface between the development system and the organisation. The strategic entry point is not associated with the organisational operation per se. Priority to the leader development system, with the strategic interface, is to figure out and articulate organisation values, the culture the organisation wishes to enable, collective leadership capability required and the competencies and behaviours that are required in light of the strategy to be implemented. These elements form a leadership strategy. Absence of a leadership strategy results in a developmental system being limited to “fix what is broken.” There is a potential incidental outcome of “the right type of leader.” An operational level choice is contrary to the strategic as the development system relates to operations, and is typically a default position when the strategic level choice is not pursued.

Literature suggests a need analysis that is linked to organisational strategy, with the

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intent of singling out effective behaviour and the identification of gaps compared with the ideal. The strategic value to this practice rests with the ability to single out the strategically most significant gaps (Leskiw et al., 2007; Luoma, 2000). I believe that literature supports a strategic doorway, provided there is the ability to single out the strategically most significant gaps compared with the ideal. Last mentioned, together with its elements to leadership strategy, provides a frame to define the ideal in light of strategy. The ability to achieve last mentioned presents strategic value.

Entry with a strategic interface brings about a development system that deliberately develops leaders in capacities espoused in light of the organisational strategy. The mentioned capacities refer to the existing elements to a leadership strategy. Literature supports the idea of a leadership strategy, which is future-related, and precedes functional HRD strategies (Pasmore, 2011). I furthermore argue that the development of leadership strategy, prior to functional HRD strategies mitigate typical risks to the HRD system. Last-mentioned risks are mentioned by Reichwald et al. (2005) as forms of development system maturity, these are: (a) A number of tools, instruments and sub-systems in support of leaders and leadership development. The tools are optimised for their use, but lose sight of a larger system outcome and integration with it. (b) The use of a limited number of instruments, together with efficient processes. However, the leadership development priorities, or topics, are not considered a priority and the leadership development system therefore functions as parallel and disconnected to the business system, in particular the overall strategy, structure and culture. A third level of maturity, by Reichwald et al. (2005), is integration and alignment between the leadership development system and business system with a fit or alignment with strategy, structure and culture. The leadership development system seeks to balance support to both stability and change through the organisation's ability to learn and change.

Entry with an operational interface brings about a development system that is organisationally contextual relevant, but achieves responses to deficits and has an incidental contribution to the development of the future leadership. The entry point or interface is a choice. However, entry at a strategic interface demands senior leadership's participation. Data indicates the requirement of senior leadership's participation as more than a system response to a gap, but as an articulation of future

leadership requirements in light of strategy.

### **3.9.7 A Structural Doorway**

I identify, from the contribution of Delta, a Structural Doorway. Entry of the development system, to the organisation, on basis of the Structural Doorway considers decision-making, capacity required and discretion afforded within a leadership system. The point of view is adopted that the nature or complexity of organisational strategy demands various levels of complexity in decision-making capability. I consider this doorway different from the Strategy Doorway. The Strategy Doorway considers future leadership, whereas the Structural Doorway considers the leadership system's decision-making discretion and capacity. This doorway relates to the awareness of, and discretion afforded to leaders in their decision-making to produce long-term plans. Emphasis with this doorway is with the required awareness of environmental factors that have future organisational impact, and the capability to make long-term plans to prepare the organisation. However, this capability is balanced with the real discretion of leaders to make long-term decisions.

Delta makes a contribution to a development system priority; that I refer to as a Structural Doorway. This doorway has a concern with leaders' awareness to matters that effect the organisation, and the discretion afforded to such leaders in their decision-making to produce long-term plans in light of environmental factors. Delta highlights the leadership importance to "The capability to have the awareness of factors that would have a future impact on the business, and we make strategic long-term plans to prepare the organisation." This capability is balanced with the real discretion of leaders to make long-term decisions. "It is important to really consider the discretion people have to make decisions."

Delta furthermore states that consideration of a development system should be the actual level of discretion:

*It is important to really consider the discretion people have to make decisions. Levels of work are shifted down if there is no real discretion to make long-term decisions.... if you really look at the extent of discretion they have, for example, very large measures of*

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*regulation that reduces discretion or maintain in a specific frame.*

India, in light of leadership decision-making authority, provides a view to failure in decision-making. My view hereto is that capacity may exist to exercise the necessary discretion in more complex environments, but if the real discretion is not permissible, that more complex capacity is displaced:

*This ends up with people under you to go ahead and implement [their decisions] or they keep quiet and wait for you for the day when you have instructions from wherever. People are scared of taking decisions even if they have the authority to make the decisions. (India).*

Application of the structural doorway suggests consideration to the discretion afforded, and requirements by leaders in their decision-making. Emphasis with this doorway is on the required awareness of environmental factors that have future organisational impact, and the capability to make long-term plans to prepare the organisation. However, this capability is balanced by the real discretion of leaders to make long-term decisions.

### 3.9.8 Consideration of extant literature

Reichwald et al. (2005) make distinction between structural and interaction views to leadership systems as two general approaches to leadership. Leadership through systems is positioned at the one end, with the consideration of leadership through interaction at the other. They do argue that a predominant focus on leadership through interaction, at best, seeks to plug holes in the inherent or structural leadership system. A systemic framework to leadership systems is provided by Jaques (1985). Jaques (1985) explains that Stratified Systems Theory developed as a “comprehensive system” that integrates organisational structure, individual capability and the rendering of that capability into a framework. The essence to Stratified Systems Theory is the notion of work, defined as “Exercise of discretion within Limits to achieve an objective within the Maximum Target Completion Time.” Different time frames to “the exercise of discretion” form strata associated with individual work or organisational work (Jaques, 1985, p. 234; Jaques & Stamp, 1990, p. A-6).

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Jaques relates that employment hierarchies are typically structured in separate levels, or strata, of organising management and its function. The strata are differentiated by a range in time span that presents the maximum time of completion of the longest tasks. Individual capability, measured through cognitive power, relates to the ranges of time span within which individuals function, which represents a cognitive state (Jaques, 1985). The strata provides, according to Grobler (2005), grounding for themes with each level's unique theme and a different time horizon. The themes describe the distinctive competence, contribution, or value-add of each level (Grobler, 2005). This emphasis on time horizon with the accompanying complexity of role shifts the emphasis of the role requirement away from the individual properties, but anchors requirements per level to the responsibilities for which the role is accountable. (McMorland, 2005).

I place the requirement mentioned in decision-making capacity in context to the complexity of organisational strategy by making reference to the work of Van Clieaf and Langford Kelly (2005a, 2005b, 2007) in their application of Stratified Systems Theory. Van Clieaf and Langford Kelly (2005a, 2005b, and 2007) explain that different organisations function at different levels of strategy complexity. This complexity, according to the mentioned authors, is defined in terms of principles of complexity and not by the actual size of the organisation. They draw from the Requisite Organisation work to develop a "Levels of CEO work" framework to define CEO work complexity, accountability and decision-making authority. Van Clieaf and Langford Kelly (2007) list five levels of CEO work with accompanying levels of strategic complexity. The levels of CEO work in strategic complexity are:

- Process innovator, which relies on predictive and systemic effectiveness of current operations;
- New product, service, market innovator, which relies on breakthrough changes and balance of integration of new capabilities and its returns;
- New business model innovator, which is transformational and relies on business viability;
- Global industry or structure innovator, which is global transformational and relies on global integrity and ethic; and
- Global business or societal innovator, which is global inter-generational



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transforming and relies on global sustainability.

### 3.9.9 Summary to Structural Doorway

The Structural Doorway suggests consideration to the decision-making capacity required and discretion afforded within a leadership system. This doorway has a concern with leaders' awareness of matters that effect the organisation, and the discretion afforded to such leaders in their decision-making to produce long-term plans in light of environmental factors.

Jaques's (1985) Stratified Systems Theory integrates organisational structure, individual capability and work into a framework. Work is structured in separate levels, differentiated by the maximum time of completion of the longest tasks. The essence is the view to work, defined as "Exercise of discretion within Limits to achieve an objective within the Maximum Target Completion Time." Different time frames to "the exercise of discretion" form strata associated with individual work or organisational work (Jaques, 1985, p. 234; Jaques & Stamp, 1990, p. A-6). The core of work is thus "The exercise of discretion" (Jaques & Stamp, 1990, p. A-6). The strata provide, according to Grobler (2005), grounding for themes with each level's unique theme and different time horizon. Individual capability required, relates to the ranges of time span within which individuals function (Jaques, 1985). This emphasis on time horizon with the accompanying capacity to exercise discretion in varying complexities associated with roles anchors leadership requirements per level to the complexities and responsibilities the role is accountable for (McMorland, 2005).

The above contributions support the Structural Doorway concern with leaders' awareness to matters that effect the organisation, and the discretion afforded to such leaders in their decision-making to produce long-term plans in light of environmental factors. The above contributions suggest various levels of responsibility, and required associated discretion to be exercised as attributed to that level of responsibility or stratum. Further contributions, in organisation context, by Van Clieaf and Langford Kelly (2005a, 2005b, 2007) explain that organisations function at different levels of strategy complexity. This complexity, according to the mentioned authors, is defined in terms of principles of complexity and not by the actual size of the organisation.



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I conclude this section with the view that various decision-making capacities are required within an organisation, associated with strata to Stratified Systems Theory. The cascade of differentiated decision-making capacities and associated discretion thereto is tied to an organisational upper limit. This organisational upper limit to decision-making capacities and associated discretion are framed by the strategic character of the organisation: the decision-making capacities required to the level of strategy complexity of the organisation. Subsequent decision-making capacities and discretion relate to differentiated strata each characterised with a strategic complexity that needs to be managed. This capability requirement is balanced with the real discretion afforded to leaders to make long-term decisions. The strategic character, with the capacities and discretion requirements associated with differentiated strata, together with consideration of real discretion afforded provides the measure of complexity within which the developmental system functions and responds to. Van Clieaf and Langford Kelly (2007) list five levels of organisational strategic complexity that define complexity of CEO work, as follows:

- Process innovator, which relies on predictive and systemic effectiveness of current operations;
- New product, service, market innovator, which relies on breakthrough changes and balance of integration of new capabilities and its returns;
- New business model innovator, which is transformational and relies on business viability;
- Global industry or structure innovator, which is global transformational and relies on global integrity and ethic; and
- Global business or societal innovator, which is global inter-generational transforming and relies on global sustainability.

### 3.9.10 An Individualist Doorway

Foxtrot makes a contribution to this theme that I refer to as an Individualist **Doorway**. Foxtrot emphasises diversity of individuals within the organisation. The diversity manifests in individualised capabilities, competence and individualised relationships with context. Last mentioned is described as thinking capacities and disposition to action in context. Foxtrot provides the opinion that individualised capacity and

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dispositions to action in context are not sufficiently acknowledged from a homogenous perspective to the development of leaders.

Foxtrot states:

*We do not work in a homogenous context, the world is not homogenous. So some of the older models that assumes that we can work with a certain group as if they were all starting off at the same point, or having the same capacities, same competencies etc...*

The diversity manifests in individualised capabilities and competence, as well as individualised relationships with context. Individualised relationships between leadership and people is emphasised by India as an enabler to productive relationship:

*You need to have that element of humanity because the organisation does not exist in a vacuum. People are affected by a lot of things, outside the organisation. If you do not have that element of humanity you will not understand. Be able to capacitate them, be able to just listen, they need to know that you care about them, and then they will do what you want them to do even when you are not around.*

Foxtrot provides the opinion concerning individualised capacity in context, which is not sufficiently acknowledged from a homogenous perspective:

*I do not think that there are sufficient frameworks to help people out of that and to orientate themselves in the context, in their own ability and their own capacity to think, and to create their own relationships.*

A heterogeneous perspective, provided the contributions, would thus be to acknowledge leaders and their existing capacities, to support those leaders' learning about their context and themselves within that context and thereby to grow a greater appreciation of their ability and capacity in those or their contexts.

### **3.9.11 Consideration of extant literature**

I use the work of Han, Chae, Han and Yoon (2017) as a centre point with the introduction of extant literature. They point to three waves in the evolution of human resource development. The first wave, within the period of 1960 to 1980, had a focus in definition and process to the development of individuals. The view was adopted that human resource development should contribute to individuals' effectiveness in light of organisational objectives. The focus to human resource development shifted, with the second wave, from individual learning to organisational learning.

The shift in focus, Han et al. (2017) report to be in the period of 1980 to 1990s, was from individual emphasis to organisational emphasis. This shift was from a learning approach to a performance approach. The learning perspective held that the purpose with human resource development lies in its ability to develop peoples' learning capacity. The performance perspective held that performance was at the centre of human resource development. It is within this light that Conger and Ready (2004) state that organisations began to develop competency models in the late 1980s, and that its popularity was grounded on clarity. This clears expectations in terms of behaviour and consistency, as a single framework that provides common language and connectivity, because the competency framework provides metrics for other HR processes.

The practice to base leadership development on competence frameworks is questioned. Van der Merwe et al. (2012) state that, together with increasing demands on leadership role, increases in the level of complexity that leaders face are not always reflected in competency models. Becker et al. (2009) argue, with the use of competences, that focus should be placed on the manner in which employees drive strategy execution and value, where strategic capabilities form the basis of strategic value and a rationale for a value chain as it drives organisational performance.

The third wave, according to Han et al. (2017) brought about a diversification of human resource development work. The scope of human resource development work is considered to increase in light of globalisation and increases in technology. Human resource development, with the third wave, takes cognisance of global perspectives and at the same time "explore socially and organisationally relevant learning,

performance, and development issues” Han et al. (2017, p. 306).

I do, however, sense a required interconnection between the first wave’s emphasis to learning process and the contextual complexity associated with the third wave. The context to the last mentioned is characterised in globalisation and increases in technology. Watkins et al. (2017, p. 150) observe that leaders’ capacity to view their environments in complexity are more likely to “probe, sense, and respond than to force comfortable, but inadequate, solutions.” Petrie (2014, p. 7) makes a related argument in that “leaders’ thinking must be equal or superior to the complexity of the environment.” This, Petrie (2014) argues, is necessary for leaders to be effective. Similarly, These contributions point to the importance of leaders’ capacity to view their environments in more complex ways. It is in that light that Petrie (2014) suggests a vertical development to the development of leadership. Vertical development, according to Petrie (2014, p. 8), aims at developing the “ability to think in more complex, systematic, strategic, and interdependent ways.” Petrie (2014) furthermore makes reference to horizontal development which implies the accumulation of more knowledge, skills, and competence.

#### **3.9.12 Summary to Individualist Doorway**

The Individualised Doorway, shaped by the views of Foxtrot, emphasises diversity of individuals within the organisation. The diversity manifests in individualised capabilities, competence, and individualised relationships within context. Last mentioned is described as thinking capacities and disposition to action in context. The emphasis with the development system is to develop thinking capacities and disposition to action in an individualised way, within contexts.

A central element to this theme is individual diversity in thinking capacity and disposition to action together the requirement to be individually considerate with its development. This core relates to the first wave to human resource development, as described by Han et al. (2017). The first wave had a focus on development of individuals’ effectiveness in light of organisational objectives. The perspective held that the purpose with human resource development lay in its ability to develop peoples’ learning capacity. Han et al. (2017) describe a second theme where the emphasis of human resource development shifted to organisational performance, and a third shift

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that “explore socially and organisationally relevant learning, performance, and development issues” Han et al. (2017, p. 306).

The emphasis, with this theme, on the development of thinking capacities and disposition to action, are reiterated by Watkins et al. (2017, p. 150), and Petrie (2014). Petrie (2014, p. 7) suggests that “leaders’ thinking must be equal or superior to the complexity of the environment.” Watkins et al. (2017) observe that leaders with capacity to view their environments in complexity are more likely to “probe, sense, and respond than to force comfortable, but inadequate, solutions.”

I persist with the core of the theme that suggests development emphasis to be the development of thinking capacities and disposition to action in an individualised way, within contexts. This view seems to regress to the first wave or theme to human resource development, as described by Han et al. (2017). I deliberately make this regression in light of the previously reported views of Jakubik and Berazhny (2017). Jakubik and Berazhny (2017) suggest that focus to knowledge within an industrial economy is mainly with the application of existing knowledge. Leadership’s focus, to knowledge, within a knowledge/creative economy is with sharing knowledge, with the focus of being an enabler to create new knowledge and innovation.

### **3.9.13 Conclusions to Choosing Doorways**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

This category presents different entry points of a developmental system to an organisation. Different entry points or doorways are presented, with knowledge that each doorway has a predominant participant voice. I hold the view that the group of doorways is a substantive theme that reflects entry points of the development system to the organisation. The theme to each doorway is as follows:

- An Individualist Doorway that places emphasis on diversity of individuals within the organisation. The diversity manifests in individualised capabilities and competence, as well as individualised relationships within context. Last mentioned can be described as thinking capacities and disposition to action within context.

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- An Authenticity Doorway that places emphasis on the presence, or absence, of authenticity within the organisation. The absence of authenticity results in corporate numbness. Authentic deliberation on issues, rather than training brings about change, whereas managers and leaders may require support in the practice of authentic deliberation. Authenticity is considered a prerequisite for other training or development.
- A Strategy Doorway that makes distinction between operational entry and strategic entry. Strategic entry concerns people – individual and collective - capabilities, and culture in light of the strategy leaders seek to execute. These elements are documented in a leadership strategy. Contrary to the strategic doorway is an operational doorway that makes emphasis on operations, and responding to deficits. This doorway has an incidental contribution to the development of the leadership system.
- A Structural Doorway that considers the discretion afforded, and required by leaders in their decision-making. Emphasis with this doorway is with the required awareness of environmental factors that have future organisational impact, and the capability to make long-term plans to prepare the organisation. However, this capability is balanced with the real discretion of leaders to make long-term decisions.

It is possible, as with the previously discussed categories, to lift important descriptive elements to this theme or category. The important descriptive elements to this theme or category are:

- The Individualised doorway.
  - Diversity of individuals exists within the organisation. The diversity manifests in individualised capabilities, competence and individualised relationships with context.
  - Individualised capacity and dispositions to action in context are not sufficiently acknowledged from a homogenous perspective to the development of leader.
  - A heterogeneous perspective, provided the contributions, would thus be to acknowledge the leaders and their existing capacities, to support those leaders' learning about their context and themselves within that context and



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thereby to grow a greater appreciation of their ability and capacity in those or their contexts.

- Different philosophies to human resource development may underlie a leadership development system. One philosophy is focused to the development of individuals' effectiveness in light of organisational objectives, thus the development of peoples' learning capacity. Another focus is on organisational performance where human resource development focuses on the development of competences that enable organisational performance (Han et al., 2017).
- The development of thinking capacities is important to leadership system learning. That capacity is to be "equal or superior to the complexity of the environment" (Petrie, 2014, p. 7), with capacity to view environments in complexity to enable a capability to "probe, sense, and respond than to force comfortable, but inadequate, solutions" (Watkins et al., 2017, p. 150).
- Emphasis with an individualised doorway is, in light of modern knowledge and creative economy, the development of thinking capacities to surface new knowledge, and to shift from awareness thereto to insight and action.
- Authenticity doorway.
  - Leadership authenticity, and hence authenticity to the leadership system, implies leadership contributions that are truthful to their base motives. Absence of authenticity or truthfulness results in corporate numbness.
  - Leadership contributions that are truthful or authentic to personal values and conviction develop credibility, respect and trust in building networks of collaborative relationships. This leadership capacity aligns the responsibilities of the leader and others, whether inside or outside the organisation.
  - A leadership climate of authenticity becomes part of the organisation's identity.
  - Authenticity is not a function of training; it is best brought about by authentic deliberation, and results in change. This change or established authenticity is a prerequisite to training and development. Training and development effort, in the absence of authenticity, is likely to deepen "lies".
  - Authenticity is not a style of leadership; authenticity can exist or be absent



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regardless leadership style. An authentic facade can be presented, but the base motive remains self-interest. Misalignment of personal and organisational values is likely to result in a tension that can manifest in avoiding personal responsibility, and attempts “to dissociate from the organisational reality” (Novicevic et al., 2006, pp. 70-71).

- Strategy doorway.
  - The leadership system can exercise a choice to allow the development system to primarily interface with the organisation at a strategic or operational level. Priority with strategic interface is the articulation of organisation values, the culture the organisation wishes to enable, collective leadership capability required, competencies and behaviours required in light of the strategy to be implemented. An operational interface, even though it may be contextually valid, reduces the developmental system’s function to “fix what is broken” with an incidental outcome of “the right type of leadership”.
  - An operational level choice, contrary to the strategic level choice, is typically a default position when the strategic level choice is not pursued.
  - A strategic level choice of entry should have priority to create a leadership strategy and not to rely on a human resource development strategy. Last mentioned is a functional strategy. A leadership strategy mitigates typical risks (Reichwald et al., 2005). This is associated with the following development system maturity levels: (a) The use of multiple individually optimised leadership development instruments and subsystems, but sight of a larger system outcome is lost. (b) Use of efficient processes and limited instruments, but leadership development priorities are not considered and the leadership development system functions parallel or disconnected to the business system, in particular the overall strategy, structure and culture. (c). A third maturity level of integration between the leadership development and business systems in strategy, structure and culture. The development system seeks to balance support to both stability and change through the organisation’s ability to learn and change.
- Structural doorway.
  - The Structural Doorway advances consideration to decision-making

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capacity required and discretion afforded for decision-making within a leadership system. The complexity of the organisational strategy as well as the causal texture in which the organisation functions affect the decision-making capacity required.

- The cascade of differentiated decision-making capacities and associated discretion thereto are tied to an organisational upper limit. This organisational upper limit to decision-making capacities and associated discretion are framed by the strategic character of the organisation: the decision-making capacities required to the level of strategy complexity of the organisation.
- An actual level of discretion exists. Capacity may exist to exercise the necessary discretion in more complex environments, but real discretion is not permissible, when more complex capacity is displaced. Decision-making discretion is not only influenced by organisation structure and policy, but by, for example, large measures of regulation that reduces discretion.
- Long-term plans, in light of environmental factors, is a function of leaders' awareness to matters that effect the organisation and the discretion afforded to such leaders in their decision-making.
- The strategic character, with the capacities for, and discretion afforded, together with real discretion afforded, provides a measure of complexity within which the developmental system functions and responds to.

### **3.10 RESEARCH FINDING 6: IT IS NOT ABOUT CURRICULA: LEADERS LEARN FROM LEADERS**

I sensed a theme concerning a nature of learning within an organisation. I named the theme "Leaders learn from Leaders" as it suggested that learning was purposeful from one leader to another within and about the on-going organisation. This learning is a dynamic learning directed both internally and externally to the organisation. The concept of leaders learning from leaders require acknowledgement of the diversity of human attributes brought into learning, and pursues an individualised and social view to learning within the organisation. It became apparent that learning could also be in the form of a container detached from organisational reality. Data suggests the significance of transferring organisational wisdom between leaders, and across

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generations. The learning is not about the curriculum, but purposeful - between leaders and leadership generations to transfer organisational wisdom.

Alpha makes the argument that organisational wisdom is not likely to be carried from one generation, or leader, to another by the mere means of delivering curricula:

*There is a dilemma in the leadership space to be able to carry over the organisational wisdom of the past two generations to new generations. The learning institutions do not help, they focus to deliver curricula.” Golf stresses learning, but not necessarily to achieve qualifications. “...the importance of leadership, people learning with time, perhaps not as many qualifications.*

Participant Juliet has a similar emphasis on to the development of leaders across generations. These contributions suggest a different character to delivery of curricula for leaders to learn across, and within generations of leadership.

Participant Charlie suggests that learning institutions’ focus on delivering a curriculum is not sufficient. Charlie states that leaders learn from each other:

*The fact that an institution built up something with time, leaders learn from the previous leader, and made assessment of where the organisation is at the time, and what the environment demands from us now...*

The learning is thus not about a curriculum, but is purposeful between leadership generations within and about the on-going organisation. This learning is also, in light of Charlie, a dynamic learning directed both internally and externally to the organisation. Golf suggests: “I would see less and less actual content being delivered.” Foxtrot suggests traditional training’s limit as:

*Where we in traditional training, we will go that is not right, it is got to look like that picture... But, in training people, I do not think we are helping them think of development, am I developing my thinking capability.*

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Alpha, I believe related to dynamism, process of learning suggests “...we do not focus enough on how one learns and how you continue to learn to survive and to adapt.” Golf suggests that learning, different from curricula:

*...have them muddle their way through a conversation, and learn from what did work and what did not. So that brings me to the other thing I am biased towards and that is reflective practice.*

Echo has a view to leadership learning that is wider than the curriculum. Echo’s belief is that leaders are not taught, but to become aware, align with organisational philosophies:

*You cannot teach leaders, it is too late, you can teach managers. Then you create architecture with all of the right philosophies... The head of learning and learning consultants’ role is to ready, consult and mentor leaders in the organisation to show up in the right way.*

Foxtrot has a similar curriculum adverse view to the development of leaders, but with emphasis on diversity in context, capacity to think and relationships:

*I believe we know that there is diversity as individuals and as a group. But I do not think that there are sufficient frameworks to help people out of that and to orientate them in the context, in their own ability and their own capacity to think, their own relationship.*

Echo continues:

*When we start talking about learning and leadership development we start at the wrong place, it is even in our language. We say, oh, what is within the curriculum, or we say is it a face-to-face programme etc... So if I work at various organisations, I want to do the same thing, and I do not think that is appropriate.*

Contributions thus far suggest the necessity for leaders to learn from leaders. An importance element thereto, Kilo suggests, to be a deliberate and dynamic transfer of organisational wisdom in context. This learning, in addition may not be content taught,

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but more the development of awareness to, and alignment of world view with organisational philosophies. This learning is furthermore suggested not to be learning in, or of dependency. As Foxtrot suggests people is to be supported to, grounded on their ability and capacity to think, orient themselves in context. Delta makes reference to leadership cognitive pictures. Delta provides a limitation, or condition, with the suggestion that leadership cognitive pictures need to be different, in particular within a relationship between individuals and their managers:

*The capacity is also affected by 'leadership pictures'. We experience leadership from the next higher level, if your manager is not a level higher, then your experience is not an experience of leadership. The cognitive picture you see is the same as that of your supervisor and you do not recognise the value-add to your work, and role confusion.*

The contribution by Delta, I view, not only provides a condition to leaders learning from leaders, but also a consequence should the concept of leaders learning from leaders not be in place. One needs to see, in learning and leadership different pictures. Charlie places emphasis on:

*In a sense yes, in fundamental matters, but when it comes to your environment you need to be open to something else. That is where I believe many problems arise due to the thought if this is how it works. This also has to do with time, people that have a specific style over a long period of time, do not necessarily change...*

Contributions from Charlie, Delta and Juliet suggest that leaders learn from leaders. Leaders learning from leaders is a shift away from a curricular view. Leaders learning from leaders acknowledge human attributes to learning and diversity, which assumes an individualised view to learning within the organisation. As Golf states:

*I still see the absolute merit in the social learning and my sense is that the Rolls Royce of social learning is when we sit as a group together, you learn by interacting.*

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I hold, from the preceding points of view, that:

- An important element to the organisational leadership learning is the transfer of organisational wisdom from one generation of leaders to another.
- Learning is purposeful from one leader to another within and about the on-going organisation.
- This learning is a dynamic learning directed both internally and externally to the organisation.
- It is possible for a predominate focus of learning a curriculum delivered to be a container that inhibit learning; emphasis on dynamic and contextual organisational leadership system learning is a means to collapse the curriculum container.
- Emphasis with leadership learning is not the curriculum, nor the content, but awareness to, and *alignment with organisational philosophies*.
- The concept of leaders learning from leaders requires acknowledgement of the diversity of human attributes brought into learning, and pursues an individualised and social view to learning within the organisation.

### 3.10.1 Consideration of extant literature

Buchel and Sorell (2012) point out those organisations that are good at acquiring knowledge, sharing and integrating knowledge with its existing knowledge are typically better performing organisations. The afore-mentioned activity implies contextual learning to leading of organisations. The matter of contextual learning is raised by Reeves-Ellington (2009). Reeves-Ellington (2009), in light of context, differentiates between “leadership of organisations” and “leadership in organisations.” The notion of leadership in organisations, according to Reeves-Ellington (2009), typically focuses on leadership traits and behaviours, whilst a focus on leadership of organisations shifts towards learning what forms leadership in the organisation.

I move to, in light of the above differentiation, to a view by Bolden (2010). Bolden (2010) differentiate leader development from leadership development. Leader development, according to Bolden (2010), focuses on individuals, and contributes to human capital development. Leadership development, in contrast, focuses on

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“interpersonal networks, cooperation and collaboration within and between people and organisations.” This contributes to the development of social capital. Jakubik and Berazhny (2017) suggest leadership is to create meaning, leadership that facilitate collaboration, high-performing teams and communities, and remain within an interrelation with stakeholders. Olivares (2008) contributes with the view that leadership development involves the development of collective capacity, but emphasises it as intentional, forward-looking, effort to improve human and goal-directed relationships. Similarly, Matlay (2000) stresses the forward-looking posture to improve the collective capability and that employees at various levels in organisations need to continually learn new and different ways of reacting to competitive demands. These contributions suggest that leadership of organisations are as important as leadership in organisations. It is to this view that I make reference to Reichwald et al. (2005) who distinguishes between structural and interaction views to leadership systems as two general approaches to leadership. Leadership through systems is positioned at the one end, with the consideration of leadership through interaction at the other. They do argue that a predominant focus on leadership through interaction, at best, seeks to plug holes in the inherent or structural leadership system.

The above suggests leader development as the development of human capital, and the development of leadership as the development of social capital. Social capital poses the capability to lead network collaboration and cooperation within and between people and organisations. The aims of learning provided in the context, can either be the application of existing knowledge, or sharing of knowledge, with the focus of being an enabler to create new knowledge and innovation. In addition, the character of learning may vary between learning focusing on leadership traits and behaviours, or the context that forms leadership in the organisation (Reeves-Ellington, 2009; Jakubik & Berazhny, 2017; Bolden, 2010). I wish to point to typical methods or pedagogy to leadership development other than the already mentioned aims and character of learning.

Reynolds and Trehan (2008) provide a view to four alternative methods to the development of leaders. One method Reynolds and Trehan (2008) list is traditional education, which assumes a hierarchical method where participants receive wisdom. The process of management is not considered as important. A second method is



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critical management studies, which maintain a hierarchical method, where participants are encouraged to challenge and question received wisdom. The process of management is not considered as important. A third method mentioned by Reynolds and Trehan (2008) is management development. Management development is a participative method with an emphasis on the process of transferring wisdom received. A last method mentioned by Reynolds and Trehan (2008) is critical management education where ideas are generated and co-constructed. It is participative with participation considered a microcosm as a source of learning. This spectrum of methods to development may be employed within, or on behalf of organisations, for leadership development. It is, however, noteworthy to consider the development of corporate universities and its methods over time provided these methods. Dufour and Wargnier (2010) indicated, almost a century ago, that several corporate universities transformed from a faculty-delivering learning curriculum to coaching and consulting services. A similar shift to corporate universities is echoed by McAteer and Pino (2011) who relate a shift from classroom instruction towards facilitation of the use of user-generated knowledge, distributed decision-making and cross-functional collaboration.

In achieving planned and intentional responses for an organisation's benefit Human resource development Practitioners typically align development with organisations' strategy implementation (Moore, 2004). Leskiw and Singh (2007) explain needs assessment as the setting of objectives to ensure that the development system links to the overall organisational strategy; and secondly, to single out effective behaviour and the identification of gaps compared with the ideal. Porter (1985) has emphasised the development and strategy link with the view that different generic strategies require different skills and cultures for success. Another example of HR proposition linked with "business challenges" is provided by Lissak, Geller, DiMarzio and Neo (2009). They argue that HR strategies should support organisational strategy and plans to grow revenue; and that HR strategies should thus ensure a correct supply of skills competences and experience.

The above archetypes lean to learning that addresses skill gaps in light of the strategy that resonate with industrial economics with the premise that the business environment allows cycles of typical planning, organising, directing, implementing and control. Learning is thus ultimately used to skills gaps as the organisation embarks on

strategy implementation. (Luoma, 2000)

Arguments are made that economies are not always at equilibrium, nor does it undergo well-anticipated changes. There is change where the context is not perfectly clear or perfectly understood (Von Krogh & Roos, 1995; Kraak, 2010). Development within these environments is essential to the organisation's ability to integrate, reconfigure, acquire and deploy resources (Chen & Chang, 2011; Von Krogh & Roos, 1995; Kraak, 2010). Development in this light, contributes to bring about capabilities, not merely distinct knowledge or skills sets of people or groups in response to a gap, but desired behaviour in organisational capabilities. (Luoma, 2000) Minas (2005), in light of environments of either stability and certainty or complexity and low levels of certainty, argue foci on either increases in competence, or capabilities through development effort. Minas (2005, p. 36) states the requirement exists to develop the capability to "generate creative adaptive solutions to new and emerging problems" in environments of complexity and low levels of certainty. Minas (2005) continues to assert that, at that time, education focuses predominantly on competences, which is not sufficient development in environments of complexity and low levels of certainty. Watkins et al. (2017) argue that complexity is treated in reductionist ways where problems can be solved in isolation to system context or environment. Watkins et al. (2017) suggest that leaders should move away from a view of predictability or linearity of environments, but should adopt a view of complexity. Last mentioned, according to Watkins et al. (2017, p. 150) requires leaders that "probe, sense, and respond" in contrast with leaders that "force comfortable, but inadequate, solutions." Open economies present dispersed resources and rapid innovation and organisations, within such environment, needs to influence or shape the "rules of the game" to be or become competitive. Such process entails complex interaction and co-evolution between participants in the ecosystem and requires learning, interpretation and creative activity (Wallin, 2012).

### **3.10.2 Summary to Leaders learn from Leaders**

The theme leaders learn from leaders places emphasis on the character of learning within an organisation. It suggests that learning is purposeful from one leader to another within and about the on-going organisation. The learning is a dynamic learning

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directed internally and externally from the organisation. The concept of leaders learning from leaders requires acknowledgement of the diversity of human attributes brought into learning, and pursues an individualised and social view to learning within the organisation. Data suggests the significance of transferring organisational wisdom between leaders, and across generations. It became apparent that learning can also be in the form of container detached from organisational reality. The learning is not about curricula, but purposeful between leaders and leadership generations to transfer organisational wisdom.

I make specific reference to the view of Reeves-Ellington (2009) who suggests the ideas of “leadership of organisations” and “leadership in organisations.” Last mentioned typically focuses on leadership traits and behaviours, whilst the other shifts towards learning what forms leadership in the organisation. Leadership of organisations is common to literature with different emphases on interpersonal networks; communities; interrelation with stakeholders; cooperation and collaboration; creating meaning; intentional; collective capacity and learning new and different ways to react to competitive demands (Matlay, 2000; Olivares, 2008; Bolden, 2010; Jakubik & Berazhny, 2017).

The aims with learning provided in the context, can either be the application of existing knowledge, or sharing knowledge, with the focus of being an enabler to create new knowledge and innovation. In addition, the character of learning may vary between learning focusing on leadership traits and behaviours, or the context that forms leadership in the organisation (Reeves-Ellington, 2009; Jakubik & Berazhny, 2017; Bolden, 2010). Emphasis is suggested, given a systems view to leadership, to be with the context that forms leadership in the organisation. This emphasis is reflected in shifts, already made more than a century ago, to corporate university models. The shift is from a faculty delivering learning curricula towards facilitation of the use of user-generated knowledge, distributed decision-making and cross-functional collaboration (Dufour & Wargnier, 2010; McAteer & Pino, 2011).

I persist with the view that leadership learning is purposeful from one leader to another, within and about the on-going organisation. The learning is a dynamic learning directed internally and externally from the organisation. The emphasis is not on the

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delivery of curricula, but user-generated knowledge, distributed decision-making and cross-functional collaboration. The concept of leaders learning from leaders is about learning leadership of organisations, and requires acknowledgement of the diversity of human attributes brought into learning, and pursues social view to learning within the organisation. This social view to learning ties together interpersonal networks, communities and stakeholders in goal-directed learning. The character of learning is intentional, cooperative, collaborative and meaning-making as a collective capacity to learning new and different ways.

### **3.10.3 Conclusions to Leaders learn from Leaders**

I offer this conclusion to point at a central theme. I also highlight descriptive elements I consider important to the theme.

This category suggests a central theme that leaders learn leadership of organisations from leaders. It is a dynamic internally- and externally-directed learning. Emphasis is not on the delivery of curricula, but on user-generated knowledge, distributed decision-making and cross-boundary collaboration. It is possible, as with the previously discussed categories, to lift important descriptive elements to this category. The important descriptive elements to this category are:

- Leadership learning is purposeful from one leader to another transferring organisational wisdom between leaders, and across generations of leaders. It is a dynamic internally- and externally-directed learning about the on-going organisation focused both internal and external to the organisation.
- Leadership learning acknowledges diversity of human attributes brought into learning, with an individualised and social view to learning. Learning may be in the form of container, about curricula, detached from organisational reality.
- The aims with leadership system learning may be the application of existing knowledge, and/or sharing knowledge with the focus of being an enabler to create new knowledge and practice.
- The character with leadership system learning may focus on leadership traits and leadership behaviours or the context that forms leadership in the organisation. Last mentioned forms organisational leadership with emphases on practices of creating meaning; developing collective capacities; making use of networks; achieving

cooperation and collaboration; and learning new and different ways by user-generated knowledge, to react to environmental demands.

### **3.11 SUMMARY**

The categories presented form the basis to considerations to the design of intentional and future-oriented leadership development systems. A description to a further phase of analysis towards architecture will follow in Chapter 4. Chapter 4 presents my consideration of interrelationships between categories, as a process of axial coding, towards a whole picture (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001).

My first consideration of data, as reported in this chapter, brought about a frame of provisional categories, named per data set. This frame changed and was refined with subsequent data collection and analysis. I compared provisional categories with each other, as well as with data fragments from more data collected, which brought about a first set of nine substantive categories that is illustrated in Table 3.2.

I proceeded to consider similarities and differences between categories within my provisional categories, as well as with data fragments from later data. I moved, with the addition of more data sets, from filtering and sorting data towards a more abstract understanding of data (Charmaz, 2012). I considered categories and whether data fragments fitted the meaning I attached to categories (Lee, 1999). I looked for repetition, but not necessarily in frequency of repetition to data fragments, but categorical in terms of units in meaning.

The categories evolved with analysis. A later set of seven substantive categories replaced the set of nine as illustrated Table 3.3. I did, at this stage, consider my categories to be stable based on the view that data incidents would not create new categories (Locke, 2001). Continual comparison led to a further reduction in categories to a frame of six substantive categories.

I considered my categories to be stable, and commenced to introduce extant literature to the categories. The review of literature contributed to form meaning to concepts (Huysamen, 1993), and assisted to augment the categories (Bloomberg & Volpe, 2008; Chiovitti & Piran, 2003; Suddaby, 2006; Thornberg, 2012; Mills et al., 2006). The

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meanings I take from the categories are not exclusively derived from participant data, but also from insights of the researcher. This is considered prudent as the researcher adopts an epistemological position that knowledge is created with interaction between researcher and respondents. This is a constructionist point of view where reality, or meaning, is co-constructed through interaction between researcher and participants. The researcher is part of the process rather than an objective observer (Bhatt, 2000; Mills et al., 2006). The meaning I made of categories as themes to categories is reflected in Table 3.4 The categories with its themes at this point, or meaning I made from categories, have transitioned from thematic categories to categories with conceptual relevance (Locke, 2001).



## CHAPTER 4

### INTEGRATION OF RESEARCH FINDINGS

#### 4.1 INTRODUCTION

This thesis has the purpose of creating organisational leadership development architecture as a fundamental framework to an intentional and future-oriented leadership development system. Associated research aims with this study are:

- Identifying and reporting on considerations to the design of an intentional and future-oriented leadership development systems, from field data;
- Differentiating considerations to the design of leadership development systems into a frame of interrelation; and
- Constructing a series of considerations and logic to their effect on the design of a system for the development of organisational leadership.

I have presented my research findings as a narrative from data (Bloomberg & Volpe, 2008) in Chapter 3. The development of thematic categories was based on my understanding of related data fragments from field data (Bitsch, 2005). I have, in developing and presenting the categories, made reference to extant literature to expand on the categories (Thornberg, 2012; Mills et al., 2006; Suddaby, 2006). The extant literature contributed to the development of categories and started a shift to consider conceptual meaning (Suddaby, 2006; Chiovitti & Piran, 2003).

Forming part of continual reporting on data analysis, the outcome of axial coding in this chapter. It is a continuation of analysis considering interrelationships between categories towards a conceptual whole as a theoretical framework (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001). To form conceptual categories I moved away from data incidents and thematic categories, I consider the meaning of categories and their interrelationships (Bloomberg & Volpe, 2008); I believed the conceptual categories together with their properties would present areas of consideration to a development system.



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First I provide an overview of my axial coding process after which using Fishbone Diagrams, I illustrate the process towards a more conceptual and integrated understanding of the categories. Finally, I provide an integrative narrative of thematic categories that provides insight to apparent contradictions of the data.

### 4.2 AXIAL CODING

My analysis shifted to investigate relationships between thematic categories. I considered interrelationship between categories towards a more conceptual but integrated understanding to produce a theoretical frame (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001). I considered the meaning of categories with their interrelationship with other categories to allow an understanding of considerations to the design of leadership development systems into a frame of interrelation.

I first made an effort with this analysis to compare data fragments with categories not to have duplication of fragments across categories while acknowledging overlap with open coding (Lee, 1999). I had an open mind in light of my belief that I already have delimited categories for the possibility of new categories to form. This may have come true with misplaced data fragments of similar nature that meaning may constitute a new category. No new categories were formed. However, some categories were reduced. Table 4.1 reflects the categories I believed to be delimited already with open coding (as discussed in section 3.2 of Chapter 3) together with the categories resulted from comparison of meanings with axial coding. I considered these as my substantive categories and continued to consider how one category influenced another.

I have adopted an approach similar to that of Viljoen in Martins et al. (2017) and Keevy (2018) when considering interrelationships. Viljoen in Martins et al. (2017) and Keevy (2018) considered categories, and asked how one category influenced another. The number of influences were noted and represented visually to understand and describe relationships between categories. Keevy (2018) continued to make use of Ishikawa diagrams to consider possible causes to thematic challenges.

I adopt techniques similar to those of Viljoen in Martins et al. (2017) and Keevy (2018) but in a different way. I make use of Ishikawa diagrams to consider why one category has an effect on another, and make use of that insight to create a picture of

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interrelation. I considered, with this analysis, similarity in meaning to categories' affect to the focal category and not the frequency of repetition of data constructs. This practice is consistent with what Suddaby (2006) argues the grounded theorist's interest is in participants' subjective experiences to abstract into theoretical statements. I conclude each application of the fishbone diagram with a conceptual meaning I formed in analysis of the category.

**Table 4.1: Frame of categories as delimited by the researcher**

Frame of seven categories as delimited during open coding	Frame of six substantive categories as product from axial coding
<ol style="list-style-type: none"> <li>1. Dual Cores</li> <li>2. Purposing and Cowardice</li> <li>3. A Point in Time, or Time Series</li> <li>4. Choosing Doorways</li> <li>5. Making Sense</li> <li>6. Leaders learn from leaders</li> <li>7. Transform Development</li> </ol>	<ol style="list-style-type: none"> <li>1. Dual Cores</li> <li>2. Purposing and Cowardice</li> <li>3. A Point in Time, or Time Series</li> <li>4. Choosing Doorways</li> <li>5. Making Sense</li> <li>6. Leaders learn from leaders</li> </ol>

### 4.3 ISHIKAWA DIAGRAMS TO BETTER UNDERSTAND RELATIONSHIPS

The use of Ishikawa diagrams, or fishbone diagrams, is a technique to consider and group potential causes to a phenomenon. (Keevy 2018) Bounds, Dobbins and Fowler (1995) report that Ishikawa diagrams developed by Kaoru Ishikawa are used for illustrating casual relationships. The benefit in use of this technique, according to Bounds et al. (1995) is in its utility to identify and prioritise casual relationships.

#### 4.3.1 The application of the fishbone diagram with the category Making Sense

Figure 4.1 illustrates application of the fishbone diagram to the category Making Sense. The central theme to Making Sense is the focal point, with the central themes to the balance of categories the dimensions to analysis. I follow the same routine with the balance of dimensions. Consider the question: Why does Purposing "leadership

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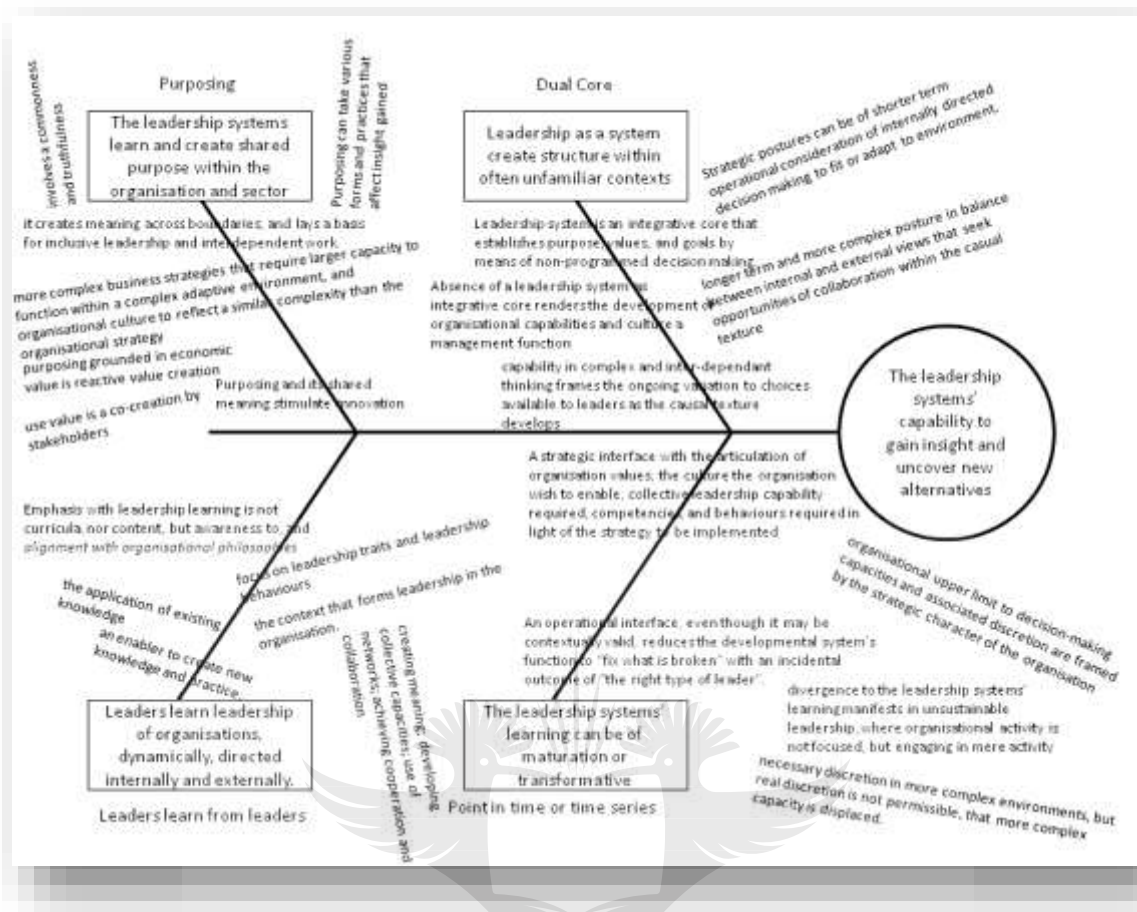
systems learn and create shared purpose within the organisation and sector affect Making Sense?” and “Why the leadership system’s capability to gain insight and uncover new alternatives?”

Data suggests that learning of purpose is collective, forward-looking and across boundaries. The shared meaning achieved provides rationale for the strategic posture and the basis for continued leadership and interdependent work. Data does suggest different orientations to value that underlying purposing. The orientation may be grounded in economic value with primary concern dominance by competitive relationships. Alternatively, it may be grounded in humanity with an extended perspective to meaning of organisational value framed in use value as a co-creation of value by stakeholders. This extended perspective presents a more complex strategy. It requires a larger leadership capacity and culture to function within an adaptive environment where that capacity and culture reflect the complexity of strategy.

The choice of practices with a learning purpose, influenced by the orientation to value, affects the form of learning and alternative insights achieved with stakeholders. Learning purpose can be by consultation as incremental process of testing and adaptation, engagement towards common knowledge structures in values and principles or by partnering on common ground in responsibility. It is noticeable that these practices sequentially grow in interdependence with stakeholders and present an increasingly complex capacity and capability.

My consideration of Dual Cores (“leadership as a system create structure within often unfamiliar contexts”) affect to Making Sense is illustrated in Figure 4.1. The leadership system creates structure with purposing by providing organisational purpose, value, goals and strategic posture. The leadership system provides that by non-programmed decision-making. In this light and in the complex and inter-dependant thinking the leadership system’s capability frames the variation of options in purposing and strategic posture.

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**Figure 4.1: The application of the fishbone diagram with the category Making Sense**

A shorter term internally directed posture to fit or adapt to the environment can be adopted. Otherwise, a posture of reinvention without concern to the environment can be assumed. These reduce the dual cores interplay between leadership and management to a management domain. Longer-term, but more complex posture can be assumed to continuously balance internal and external demands with the leadership system's objective of making use of opportunities in collaboration within the casual texture.

A capability in complex and inter-dependant thinking is of particular note with a posture of collaboration within the casual texture. The leadership system becomes overt actors within the texture, and variation of choices unfolds as the causal texture develops in time. This emergence of choice with leadership system responses thereto relies on more than a leadership system's accumulated knowledge, skills and competence.

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These form an input, but is not a substitute to the leadership system's capability in complex and inter-dependant thinking.

The effect of leaders learns from leaders ("leaders learn leadership of organisations, dynamically, directed internally and externally") is centred to the notion that leadership learning is not simply about delivery of curricula. Leadership learning is about awareness of and alignment with organisational philosophies as purpose, value, goals and strategic posture.

Learning, in this light, is not the application of existing knowledge, but learning is an enabler to new knowledge and practice. Learning may focus as learning leadership in organisations with emphasis on leadership behaviour and traits. Leadership learning may be leadership of organisations, which considers the context that forms leadership consideration of purpose, goals, value, strategic posture, capabilities and culture. It is a dynamic internally and externally directed learning about the on-going organisation focused both internally and externally to the organisation.

The last dimension considered is Point in time, or time series, namely that: "The leadership systems' learning can be of maturation or transformative." An element of a leadership system's learning is its capacity to synthesise awareness and understanding of past events and action, current contextual variables with a preferred future. This preferred future is framed by the organisational purpose, goals, and values: purposing. There is a common understanding of emphases on the current and past. Divergence to the leadership systems' learning manifests in unsustainable leadership, where organisational activity is not focused, but engaging in mere activity.

The logic to leadership system's learning, in light of a preferred future, can be one or a combination of maturation or transformation. Maturation is an inert increase of system capacity to a point of completeness or considered established, or transformative towards a different system capacity. A transformative logic relies on insights, or on a leadership system's wisdom not to consider a future to be a continuation of the past. Maturation logic places emphasis on mastery of previously mental models, patterns of interaction and activity. The core to maturation is insights gained from experiences and to use those as basis to future predictions.

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I bring elements of Choosing Doorways into this discussion. The Strategy Doorway is concerned with the interface between the developmental system and organisation. A strategy level interface responds to the leadership system's articulation of organisational purpose, values, goals, culture, collective leadership capabilities, competences and behaviours required in light of strategy. Alternatively, an operational interface focuses on closing gaps or fixing what is broken. This is a practice that has no direct line of sight with, amongst others, the values, culture and collective leadership in context of organisational strategy. The first interface is likely to perpetuate a desired strategic posture and logic. The last-mentioned interface is likely to drive learning to operational activity with little effect to the leadership system's capacity.

Further consideration to the Structural Doorway relates to the complexity of the organisational strategy and the composition of the leadership system. Different organisational strategic postures require different capacities in decision-making from the leadership system. The composition of the leadership system brings capacity in decision-making. Parallel to this capacity is the business strategy with articulated forms of upper thresholds to decision-making capacity required. The capacity to complex decision-making is displaced where organisational strategic postures and strategy require complex decision-making capabilities, but the organisation or environment does not provide discretion to decision-making. This displaced capacity is likely to result with maturation logic to learning.

I end this section with a brief summary, as Table 4.2, of the focal point in terms of the dimensions discussed. I find the summary of use as it provides a synopsis for clarity purposes. The synopsis is a useful point as similar analyses of the other focal points are discussed.



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**Table 4.2: Synopsis to analysis of focal point: Making Sense**

Dimensions			
Purposing	Dual Cores	Leaders learn from Leaders	Point in time or Time Series
<p>More complex strategy postures require greater leadership system capacity to function in an adaptive environment.</p> <p>Choices to practice in learning purpose, influenced by orientation to value creation, affect insights gained with stakeholders.</p>	<p>The leadership system provides structure as purpose by non-programmed decision-making.</p> <p>The leadership system's capability in complex and inter-dependant thinking frame the variation of options in purposing and strategic posture.</p> <p>A shorter term internally directed posture reduces the dual core interplay between leadership and management to a management domain.</p>	<p>Leadership learning is about awareness to and alignment with organisational philosophies.</p> <p>This implies emphasis in learning leadership of organisations, more than learning of leadership in organisations.</p>	<p>The logic to leadership system's learning can be one or a combination of maturation, or transformation. Maturation is an inert increase of system capacity to a point of completeness or considered established; or transformative towards a different system capacity.</p> <p>An operational interface between a developmental system and organisation focuses on fixing what is broken, a practice which has not a direct line of sight, with strategy posture and have internal focus and little effect on leadership system capacity.</p> <p>Lack of discretion to leadership decision-making displaces complex decision making capacities and result in logic of maturation.</p>

I formed a different understanding to Making Sense with the comparative analysis. I conclude that primary construct to Making Sense is the leadership system's capacity to "Surface and cultivate organisational philosophies." These philosophies are: the orientation to value creation; strategic posture as shorter-term internally directed or longer-term balancing internally and externally directed learning; leadership learning focus to leadership in organisations, or leadership of organisations; and a logic to learning of either transformative or maturation.

## 4.3.2 The application of the fishbone diagram with the category Purposing

I considered Dual Cores, Making Sense, Point in Time, and Leaders learn from Leaders as dimensions to this analysis. The focal point is Purposing, namely: Leadership systems learn and create shared purpose within the organisation and sector." I asked the question "why do those dimensions affect the focal point?"



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Figure 4.2 illustrates consideration to the question why does Point in time (“The leadership system’s learning can be of maturation or transformative”) affect Purposing? The leadership system illustrates its learning capacity to synthesise awareness and understanding of past events, actions, current variables with a preferred future with logic to learning that is either maturation, or transformation.

Maturation logic has a predominant character considering the future as extension of the past. Insights gained from the past form the basis for future prediction, with the system focused to increase system capacity to achieve completeness or considered established. Core to maturation is insights gained from experiences and the use of those as basis to future predictions. It makes emphasis to mastery of previously knowledge structures, patterns of interaction and activity. A transformative logic relies on insights not to consider a future to be a continuation of the past. Transformative logic challenges existing knowledge structures, potentially holds alternatives and considers different system capacities.

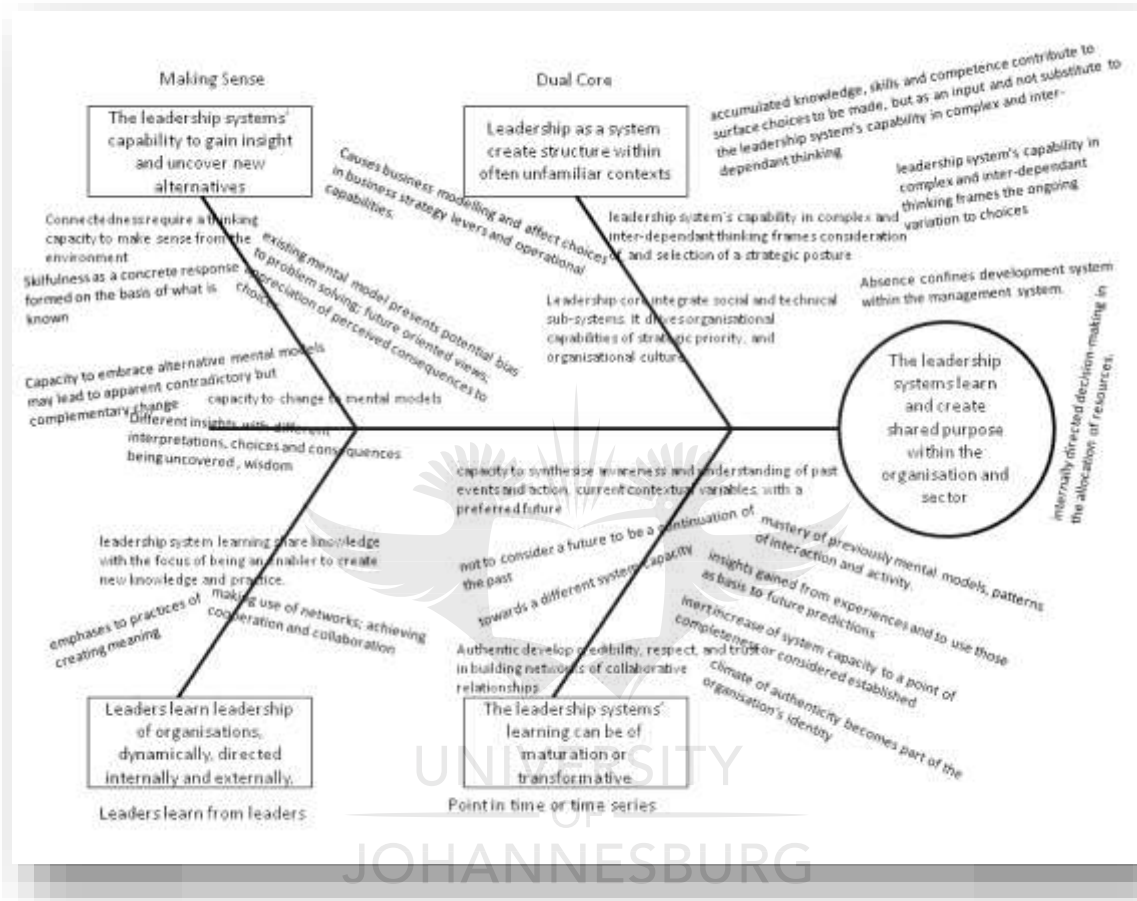
I derive a further element to my understanding of the way in which “The leadership system’s learning of maturation or transformative” affect purposing from the Authenticity Doorway. Authenticity develops credibility, respect and trust within networks of collaboration. A climate of authenticity enables learning shared of purpose with contributions from leadership that are truthful to their base motive. Credibility, respect and trust are developed in collaborative networks where capacities are required to bring about consultation, engagement or alignment of responsibilities.

A further dimension considered to this focal point is Making Sense as “Leadership system’s capability to gain insight and uncover new alternatives.” An element to making sense that I highlight is the leadership system’s connectedness with the environment. This connectedness requires a thinking capacity to make sense from the environment.

Connectedness with the environment is characterised by patterns of skilfulness or wisdom. Skilfulness implies concrete responses on the basis of what is known, whereas a wise character achieves or uncovers different insights with different interpretations, choices and consequences. Skilfulness is illustrated within the confine of existing knowledge structure with associated risk of bias in problem- solving, future

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views, and anticipated consequences to choices. Wisdom shows the capacity to move from a knowledge structure held, or to hold alternative knowledge structures. Organisational change, based on leadership systems' wisdom, includes change in knowledge structure at a level higher than the affected leadership system capability.



**Figure 4.2: The application of the fishbone diagram with the category Purposing**

The effect of Leaders learns from leaders, or “leaders learn leadership from organisations, dynamically, directed internally and externally” is centred to leadership learning being focused to enable new knowledge and practice. Leadership learning is purposeful from one leader to another transferring knowledge. It is not detached from organisational reality. This implies practices in creating meaning, the use of networks, and to achieve cooperation and collaboration.

The last dimension considered, is Dual Cores (“leadership as a system creates contexts.”) The leadership system as a core integrates social and technical sub-

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systems in driving organisational capabilities and culture. This organisational capabilities and culture potentially reinforce the organisation's purpose and strategic posture. I consider, in this light, the organisation's capability in complex and inter-dependant thinking a frame to choices to organisational strategic posture. This capability in light of the strategic posture creates business modelling and choices to business strategy levers, and operational capabilities.

The organisation's capability in complex and inter-dependant thinking is, however, not separated from bodies of knowledge, skills and competence accumulated over time. The bases of choices, however, do not lie with those bodies of accumulated knowledge, skills and competence, but with a capability in complex and inter-dependant thinking. The afore-mentioned organisational traits are contributing inputs and not the result. Absence of a capability and culture of complex and inter-dependant thinking reduces purpose, strategic posture, choices to business strategy to a management domain.

I end this section, as with the previous sub-section, with a synopsis of discussion in Table 4.3 and stating a different understanding I formed to Purposing with this analysis. I conclude that primary construct to Purposing is the leadership system's capacity to "Cultivate quality of thinking." The leadership system illustrates its learning capacity to synthesise awareness and understanding of past events, actions and current variables with a preferred future. This requires an organisational connectedness with its environment together with a thinking capacity to make sense from the environment. The thinking capacity in connectedness with environment can be characterised by patterns of skilfulness or wisdom. The organisational capacity in either a combination of skilfulness or wisdom reinforces the organisational learning process of purpose and strategic posture.

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**Table 4.3: Synopsis to analysis of focal point: Purposing**

Dimensions			
Dual Cores	Leaders learn from Leaders	Point in time or Time Series	Making Sense
<p>The leadership system as a core integrates social and technical sub-systems driving organisational capabilities and culture. These capabilities and culture potentially reinforce the organisation's purpose and strategic posture.</p> <p>I consider, in this light, the organisation's capability in complex and inter-dependant thinking frame to make choices to organisational strategic posture.</p> <p>Absence of a capability and culture of complex and inter-dependant thinking reduces a development system to a management domain.</p>	<p>Leadership learning is purposeful from one leader to another transferring organisational wisdom, not detached from organisational reality. This implies emphasis of practice in creating meaning, the use of networks, and to achieve cooperation and collaboration.</p>	<p>Maturation logic places emphasis on mastery of previous knowledge structures, patterns of interaction and activity. A transformative logic relies on insight not to consider a future to be a continuation of the past. Transformative logic challenges existing mental models, potentially holds alternative knowledge structures.</p> <p>A climate of authenticity enables learning shared of purpose with leadership contributions truthful to its base motive.</p>	<p>The leadership system's connectedness with its environment requires a thinking capacity to make sense. This is characterised by patterns of skilfulness, or wisdom. Skilfulness implies concrete responses on the basis of what is known, whereas a wisdom character achieves, or uncovers, different insights with different interpretations, choices, and consequences.</p> <p>Skilfulness is illustrated within an existing knowledge structure. Wisdom shows the capacity to move from a knowledge structure, or to hold alternative knowledge structures.</p>

## 4.3.3 The application of the fishbone diagram with the category Dual Cores

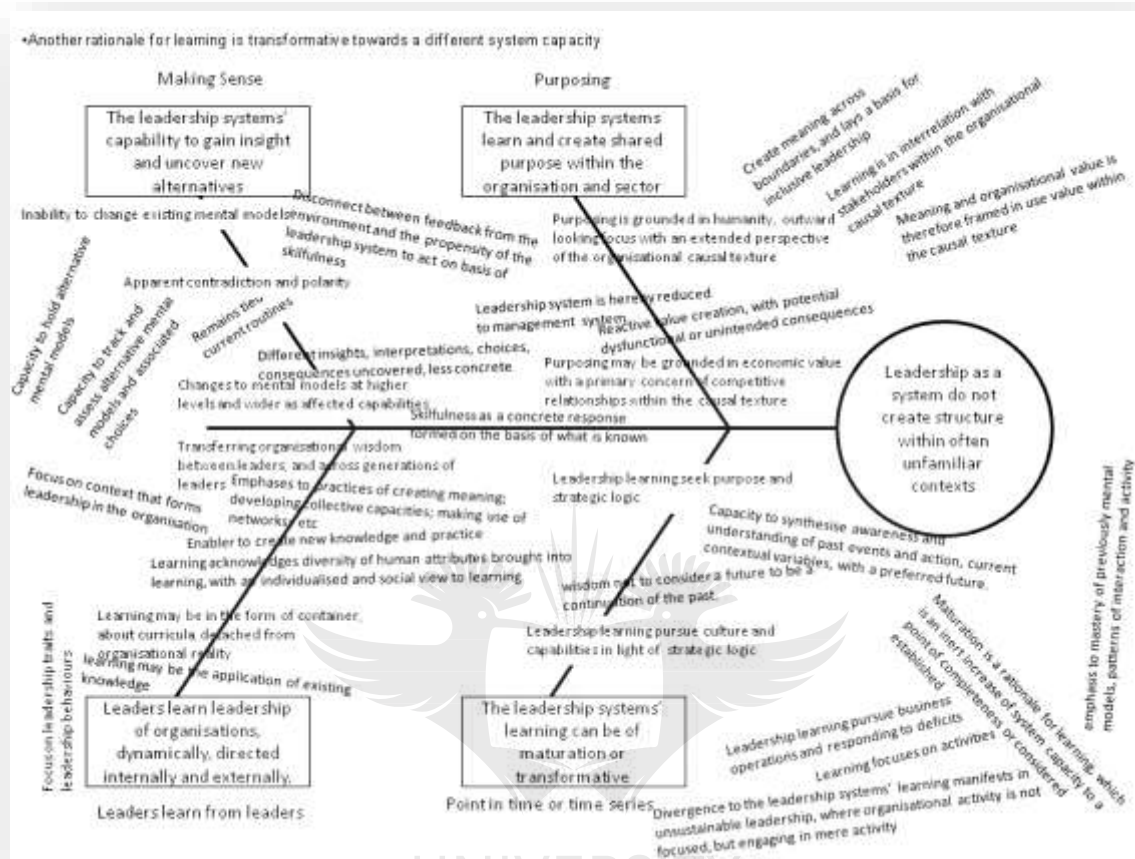
I considered Dual Cores as a focal point, and as before, considered the question: "Why do the dimensions affect the focal point of analysis?" The dimensions to analysis are Making Sense, Point in Time, Purposing and Leaders learn from Leaders.

Figure 4.3 illustrates my consideration to why Purposing "leadership systems learn and create shared purpose within the organisation and sector" affect Dual Cores. The leadership system learning of purpose frames further leadership system decision-making to decisions in culture, business strategy, and operational capabilities to develop and/or be maintained.

Purposing, grounded in humanity, has an outward-looking focus with an extended perspective of the environment. Leadership learning with stakeholders within an environment is considered as a causal texture. The leadership system, with this outlook, seeks to create meaning across boundaries, and by doing that creates a basis

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for inclusive leadership. Meaning and organisational value are framed in use value. The use value is a co-creation by stakeholders within the causal texture.



**Figure 4.3: The application of the fishbone diagram with the category Dual Cores**

Purposing grounded in economic value has a primary concern of competitive relationships within the environment to dominate. Leadership responses are, in many cases, responsive with potential dysfunctional or unintended consequences to the organisation. The leadership system is, with cycles of response to environment, reduced to a management system preoccupied with positioning operational capabilities and resources. An accompanying risk is reactive value creation, with potential dysfunctional or unintended consequences.

A further dimension to this analysis is Making Sense. This is: “Leadership system’s capability to gain insight and uncover new alternatives.” A leadership system is connected with its environment. However, the connectedness requires a thinking



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capacity to make sense from the environment. An element thereto is the capacity of the leadership system to change or hold alternative knowledge structures. Rigidity to knowledge structures with rationalisation of new observations lead to disconnection from the environment, in not being receptive of environmental signals, and therefore, reducing the potential leadership system to a management system. Organisational learning from the environment fails because of a disconnection between feedback from the environment and the propensity of the leadership system to act on a basis of skilfulness. The rigidity and affect described relate to a learning posture of skilfulness of concrete responses and remain tied to existing knowledge structure and routines.

An organisation may have the capacity to hold alternative mental models, which may surface as apparent contradiction and polarity. However, the organisation illustrates a capacity to track such knowledge structures in organisational and environmental contexts and consider associated choices. Data suggests that change to knowledge structures, or decisions based on alternative knowledge structures is to originate at levels higher than the affected capabilities, and extends wider to a capability. The capacity to track different knowledge structures in contexts and to consider associated choices is therefore to “one step up” from an immediately affected tier.

An alignment is required other than a “strategy alignment”, of strategic posture, business strategy choices, and operational capabilities for one step up. The capacity to track different knowledge structures with interplay between organisational levels to consider associated choices requires awareness of and alignment to organisational philosophies, as of patterns to thinking of skilfulness and wisdom; and logics to learning as transformative and maturation as it manifests at different tiers to the organisation.

Another dimension to the analysis of Dual Cores is Leaders learn from Leaders. An element of interest is the necessity for leaders to transfer organisational wisdom from one to another. In combination with an element from individualist doorway; the acknowledgement of diversity and human attributes to learning. Transfer of organisational wisdom from one to another does not occur with the delivery of curricula, but is found in developing collective and network capacities in making sense of the organisational context and its effect on the organisation. It is an enabler of new

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knowledge and potentially practice, and not limited to an application of existing knowledge to fit context. A diverse learning perspective is required that acknowledges existing leader capacities that support learning about context and leaders in that context and to grow different appreciations of contexts. This implies a development emphasis to thinking capacities and associated disposition to action in an individualised way within contexts.

The last dimension considered to this focal point is Point in time, or time series. “The leadership systems’ learning can be of maturation or transformative”. Leadership learning is dynamic internally and externally directed learning about the on-going organisation focused both internally and externally to the organisation. It is by learning that the leadership system integrates social and technical sub-systems. It creates purpose, strategic posture and drives organisational capabilities of strategic priority and organisational culture.

The logic to learning can be either a combination or a maturation or transformation. Maturation is an inert increase of system capacity to a point of completeness or when considered established; or transformative towards a different system capacity. Maturation logic relies on core insights from experiences as a basis to future predictions, and relies on mastery of previous knowledge structures, with potential adaptation of patterns of interaction or activity. This logic is likely to manifest in strategy practices to fit or adapt to the environment, and/or emphasis on internal reinvention. The leadership system thus represents an organisational agency of consultation with incremental processes of testing and adaptation.

A transformative logic relies on insights, or a leadership system’s wisdom not to consider a future to be a continuation of the past. It is transformative towards a different system capacity. It relies on leadership insights to consider a future different to a continuation of the past. This disposition makes use of collaborative exploits within the environment, and it goes beyond the aim of denominating a market. The leadership system becomes an overt and direct casual actor of organisational collaboration within the casual texture.

I end this section with a synopsis of discussion. I also state the different understanding I formed to Dual Cores with this analysis. The synopsis of discussion is provided in



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Table 4.4.

**Table 4.4: Synopsis to analysis of focal point: Dual Cores**

Dimensions			
Purposing	Leaders learn from Leaders	Point in time or Time Series	Making Sense
<p>The leadership system drives learning of purpose to achieve a shared meaning.</p> <p>Purposing grounded in humanity has an outward focus with an extended perspective of the environment. Meaning and organisational value is framed in use value co-created by stakeholders within the causal texture.</p> <p>Purposing grounded in economic value has concern of competitive relationships. A risk is reactive value creation, with potential dysfunctional or unintended consequences. The leadership system is hereby reduced to management system.</p>	<p>It is necessary for leaders to transfer organisational wisdom from one to another.</p> <p>A diverse learning perspective is required that acknowledges existing leader capacities, and support of learning about context and leaders' capacity to make different appreciations of those contexts. This implies a development in thinking capacities and disposition to action in an individualised way.</p>	<p>It is by learning that the leadership system integrates social and technical sub-systems. It creates purpose, strategic posture and drives organisational capabilities of strategic priority, and organisational culture.</p> <p>Maturation learning logic relies on core insights from experiences as basis to future predictions. It relies on mastery of previous knowledge structures, with potential adaptation. This logic is likely to manifest in strategy practices to fit or adapt to the environment, and/or emphasis on internal reinvention. The leadership system thus represents an organisational agency of consultation with incremental processes of testing and adaptation.</p> <p>A transformative logic relies on insights not to consider a future to be a continuation of the past. It is transformative towards a different system capacity. This disposition makes use of collaborative exploits within the environment, and it goes beyond the aim to denominate. The leadership system becomes an overt and direct casual actor of organisational collaboration within the casual texture.</p>	<p>Change to knowledge structures, or decisions based on alternative knowledge structures originate at levels higher than the affected organisational capabilities. The capacity to track different knowledge structures to consider associated choices is therefore to "one step up" from an affected tier.</p> <p>The capacity to track different knowledge structures, with interplay between organisational levels, requires awareness of and alignment in <b>organisational philosophies</b> of skilfulness and wisdom; transformative and maturation; leadership and management as it manifests at different tiers to the organisation.</p>

I consider the meaning to Dual Cores in the leadership system's capacity to "Cultivate vertical alignment" and "Being receptive to step-up." The vertical alignment is not the typical "strategy alignment", of strategic posture, business strategy choices, and operational capabilities. The vertical alignment with Dual Cores is the alignment of the interplay between organisational levels in awareness to and alignment to organisational philosophies; to patterns to thinking of skilfulness and wisdom; and

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logics to learning as transformative and maturation as it manifests at different tiers to the organisation.

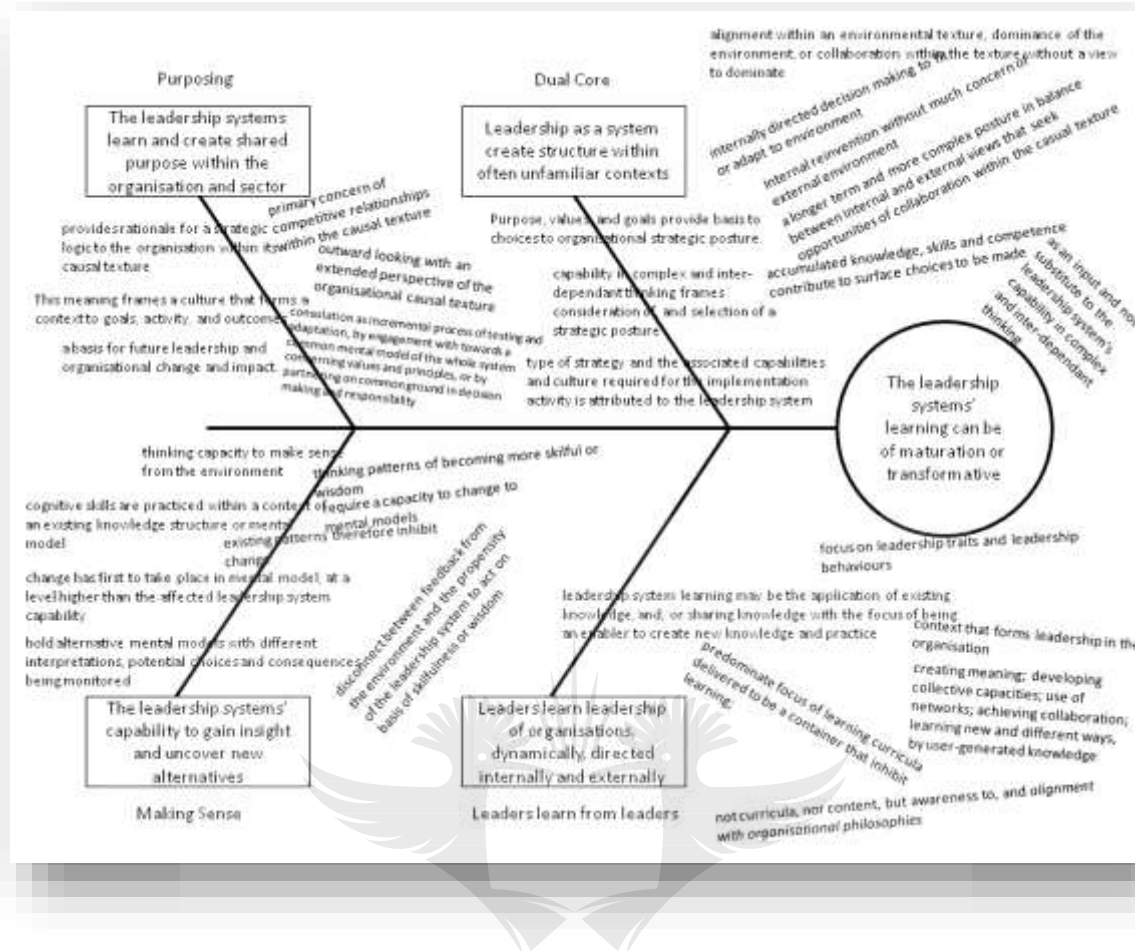
“Being receptive to step-up” emphasises the organisational capacity to hold alternative mental models, to track such knowledge structures in organisational and environmental contexts and consider associated choices. This receptiveness to step-up extends to a capacity in change stratified across tiers in the organisation. Change to knowledge structures, or decisions based on alternative knowledge structures, has to originate at levels higher than the affected capabilities. The capacity to track different knowledge structures in contexts and to consider associated choices is therefore to “one step up” from an immediately affected tier.

### **4.3.4 The application of the fishbone diagram with the category Point in Time or Time Series**

The application of the fishbone diagram to Point in Time or Time Series as focal point is illustrated in Figure 4.4. Dual Cores, Making Sense, Leaders learn from Leaders, and Purposing form dimensions to the analysis. I have, as before, considered the question “why does that dimension affect the focal point of analysis?”

My consideration to why Dual Cores “leadership as a system create structure within often unfamiliar contexts” affect Point in time, or time series is centred around the structure created by the leadership system. The leadership system creates structure with purpose, values and goals. This forms the basis to strategic posture, espoused culture, strategy levers within a business model and operational capabilities. The strategic posture, with its orientation to value creation, may be of collaboration within the strategic texture, with a view to compete, but not necessarily to dominate. Another posture, economically based, has a greater emphasis to achieve dominance within the environment. These orientations, together with the associated strategy levers to the business model present an immediate context for learning at a business and operational level to the organisation.

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**Figure 4.4: The application of the fishbone diagram with the category Point in Time**

Possible strategy levers, as already considered within Chapter 4, as deduced from Ungerer et al. (2016), Sanchez (2012), Selsky et al. (2007), and Hazy (2006), are:

- Making the most of current opportunities by incremental improvements to efficiency within the system environment;
- Creating new opportunities by making use of existing capabilities;
- Creating new opportunities by new capabilities based on existing resources;
- Creating opportunities by new capabilities based on new resources; and
- Creating opportunities by new capabilities based on new interfaces within and between organisations.

I have the view that Strategy Levers 1, 2 and 3 lean to a requirement for learning of maturation. This is my view as I consider these strategies to rely on increases of

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system capacity to a point of completeness or considered established. I am of the view that the Strategy Levers 4 and 5 are associated with transformative learning. This is my view as those strategies require different system capacities.

A further Dimension considered in analysis is the effect of Purposing “leadership systems learn and create shared purpose within the organisation and sector” on the focal point. The leadership system drives learning of purpose to achieve a shared organisational meaning. This process provides purpose, goals and values that form a rationale to strategy posture and logic, and a basis for inclusive leadership and interdependent work. More complex strategy posture and logic require larger organisational capacity and culture to function within a complex adaptive environment. The strategy posture may be grounded in humanity, which is outward- looking with an extended perspective of the environment, with organisational value framed in use value by co-creation with stakeholders within the causal texture. The afore-mentioned require a more complex logic to learning, transformative, as different system capacities are required. A necessary capability of dynamic internally and externally directed learning is about the on-going organisation.

Another dimension to the analysis is Making Sense “Leadership system’s capability to gain insight and uncover new alternatives”. An element of interest is the leadership system’s thinking capacity to make sense of the organisation’s environment. Data suggests thinking capacity may adopt patterns of becoming more skilful, or acquire a pattern of wisdom. A pattern of wisdom relies on the capacity to change or hold alternative knowledge structures; it presents different insights with different interpretations. Choices and consequences are uncovered and are less concrete than a response founded on the basis of what is known. Wisdom is a foundation to transformative logic to leadership learning. A pattern of becoming more skilful presents concrete responses based on what is known. The cognitive skill is practiced within an existing knowledge structure, which presents potential bias to problem-solving, whether it is the logic of maturation or transformative.

A last dimension to the analysis of Point in time, or time series as focal point, is Leaders learns from leaders “leaders learn leadership of organisations, dynamically, directed internally and externally”. Central to this dimension is the leadership system’s

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use of knowledge as either an application of existing knowledge, or the use of knowledge as enabler of new knowledge and practice. Learning, as reported before, may focus on leadership in the organisation, or leadership of the organisation. The afore-mentioned is likely to entertain leadership traits, behaviour and competences for performance. Last mentioned, learning leadership of the organisation implies learning how the organisational context forms leadership in the organisation. I hold that a balance between the leadership learning foci would be appropriate. However, leadership learning in organisations tends to lean towards learning maturation, whereas learning leadership of the organisation allows for leadership challenges to surface that may lead to transformative learning.

I end this section with a synopsis of discussion with Table 4.5 and stating a different understanding I formed to Point in time or Time Series with this analysis. I conclude with a meaning to Point in time or Time Series as “Linked complexity”. Organisational strategic logic varies in complexity. This logic presents an immediate context for learning at all tiers to the organisation. The more complex the strategy logic, the greater the requirement is of a leadership learning capacity in dynamic internally and externally directed learning. Some strategy logics may require learning logic more than maturation to include a transformative logic.

**Table 4.5: Synopsis to analysis of focal point: Point in time or Time Series**

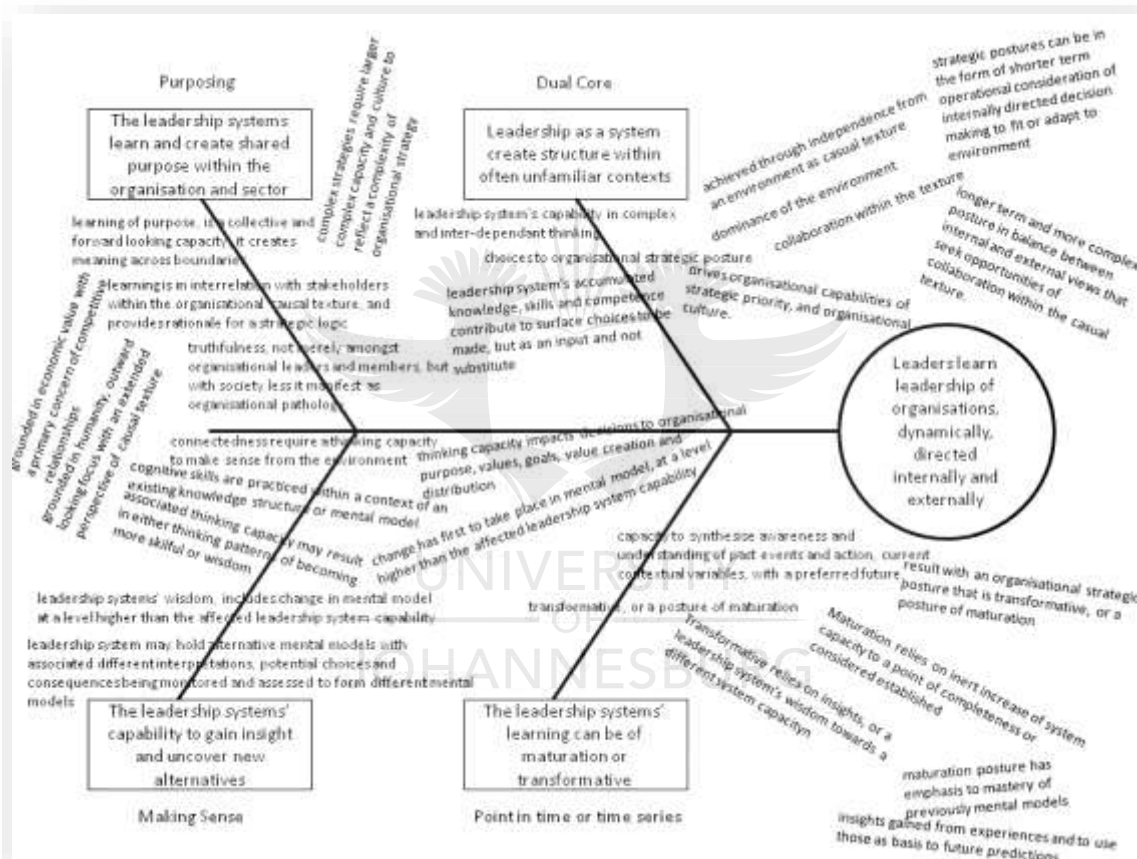
Dimensions			
Purposing	Dual Cores	Leaders learn from Leaders	Making Sense
The purpose, goals, and values (purpose) form the basis to the strategic logic of the organisation. The more complex this logic, the greater is the required leadership learning capacity in dynamic internally and externally directed learning.	<p>The strategic posture adopted together with the orientation to value creation and associated strategy levers to the business model present an immediate context for learning at a business and operational levels.</p> <p>Some strategy levers lean toward a requirement for learning of maturation, whilst other lean to transformative learning.</p>	<p>Leadership system's use of knowledge as either an application of existing knowledge, or the use of knowledge as enabler of new knowledge and practice.</p> <p>Learning focus may be leadership in, or of the organisation. A balance between the foci is required. However, leadership learning in organisations lean towards maturation, whereas learning leadership of the organisation leans towards transformative learning.</p>	<p>The leadership system requires a thinking capacity to make sense from the environment.</p> <p>Cognitive skill practiced within an existing knowledge structure presents potential bias to problem-solving, whether the logic of maturation or transformative.</p>



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### 4.3.5 The application of the fishbone diagram with the category Leaders learn from Leaders

I consider with the last application of the fishbone diagram that Leaders learn from Leaders as focal point. The dimensions to analysis are Making Sense, Point in Time, Purposing, and Leaders learn from Leaders. I consider, as before, the question “why do the dimensions affect the focal point of analysis”. The application is illustrated in Figure 4.5.



**Figure 4.5: The application of the fishbone diagram with the category Leaders learn from Leaders**

Figure 4.5 illustrates my consideration to why Purposing “leadership systems learn and create shared purpose within the organisation and sector” affect Leaders learn from Leaders. The leadership system learning of purpose is a collective and forward-looking capacity. It creates meaning across boundaries, and lays a basis for inclusive

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leadership and interdependent work. The meaning derived from Purposing forms a basis for future leadership, potential organisational change, and evaluation of organisational achievement. This collective boundary spanning and contextual character of learning emphasise dynamism to learning that is both internally and externally directed. It points to learning beyond curricula, knowledge and the application thereof in organisational context, but learning from context as enabler of new knowledge. The leadership system's learning provides logic to organisational strategic posture.

My consideration to why Dual Cores "leadership as a system create structure within often unfamiliar contexts" affect the category of Leaders learn from Leaders is centred on leadership system's capacity in complex and inter-dependant thinking. This capacity frames consideration and selection of a strategic posture. The accumulated skills, knowledge and competence of a leadership system contribute to surface choices to be made, but as inputs and not as substitutes to the leadership system's capability in complex and inter-dependant thinking. This requirement points to a character of leadership learning that goes beyond leadership traits and behaviours. It includes capacities to creating meaning, the use of networks, achieving cooperation and collaboration and learning new and different ways. It makes use of user-generated knowledge in responding to or advancing environmental demands.

The strategic postures can range from shorter-term operational consideration of internally directed decision-making to fit or adapt to the environment over a longer term, and more complex posture in balance between internal and external views that seek opportunities of collaboration within the casual texture. These postures direct learning that is either internally or externally focused. However, the leadership system as a dual core that integrates technical and social systems to achieve a balance in development of capabilities and culture aligned with the strategic posture. Absence of a leadership system in this integrative core renders the development of organisational capabilities and culture a management function.

Another dimension to the analysis of Point in time, or time series as focal point, is Making Sense ("Leadership system's capability to gain insight and uncover new alternatives.") Elements of interest are the leadership system's capacity to make sense



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of its environment. This requires a connectedness with the environment together with a thinking capacity to make sense of the environment. The thinking capacity is a cognitive skill that enables appreciation of the current environment together with a realistic expectation of the future. This capacity may result in either thinking patterns of becoming more skilful or gathering wisdom. I consider skilfulness as a concrete response formed on the basis of what is known. Wisdom presents different insights with different interpretations, choices and consequences being uncovered, and is less concrete than a response founded on the basis of what is known.

The dominant knowledge structure, whether combined with thinking patterns of skilfulness or wisdom, is a reference point to the leadership system's sense from the environment. The thinking capacity in making sense from the environment is inhibited with rationalisation of new observations, and thereby prevents processes to uncover new knowledge structures. This presents a potential disconnection from feedback from the environment, with a resultant propensity of the leadership system to act on a basis of skilfulness. Failure with leadership system responses may lead to more deliberate environmental focused learning and reconsideration of original responses, and thereby exposure to new routines of scanning and making sense of environmental feedback.

The last dimension considered is Point in time or time ("The leadership system's learning can be of maturation or transformative") affects Leaders learn from Leaders. A leadership system's learning capacity is its ability to synthesise awareness and understanding of past events and action, as well as current contextual variables, with a preferred future. This preferred future is framed by the organisational purpose, goals and values: purposing. The logic to leadership system's learning can be either a combination of maturation, or of transformation. Maturation is an inert increase of system capacity to a point of completeness. Transformative is towards a different system capacity. A transformative logic relies on insights, or a leadership system's wisdom not to consider a future to be a continuation of the past. Maturation logic places emphasis on mastery of previously mental models, patterns of interaction and activity. The core to maturation is insights gained from experiences and the use of those as a basis to future predictions.

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The previously mentioned logics to leadership system's learning, maturation or transformation, describe dynamism to learning, and can be driven or cannot be driven by a learning system within an organisation. A learning system driving logic of maturation is likely to be more internally focused, with an emphasis of traits and leadership behaviours of leadership in organisations. Transformation logic is more externally focused and is concerned with context that forms leadership of the organisation.

I end this section, as with the previous sub-sections, with a synopsis of discussion. I also provide the different understanding I formed to Leaders learn from Leaders with this analysis. The synopsis of discussion is provided in Table 4.6.

**Table 4.6: Synopsis to analysis of focal point: Leaders learn from Leaders**

Dimensions			
Purposing	Dual Cores	Point in time or Time Series	Making Sense
<p>The leadership system learning of purpose is a collective and forward looking capacity; it creates meaning across boundaries, and lays a basis for inclusive leadership and interdependent work.</p> <p>The leadership system's learning provides logic to organisational strategic posture.</p>	<p>The leadership system's capacity in complex and inter-dependant thinking frames consideration of, and selection of a strategic posture.</p> <p>A leadership system's accumulated knowledge; skills and competence contribute to surface choices to be made, but as an input and not substitute to the leadership system's capability in complex and inter-dependant thinking.</p>	<p>The logics to leadership a system's learning, maturation or transformation, describes dynamism to learning. It may or may not be driven by a learning system within an organisation.</p> <p>A learning system driving logic of maturation is likely to more internally focused, with an emphasis of traits and leadership behaviours of leadership in organisations. Transformation logic is more externally focused; concerned with context that forms leadership of the organisation.</p>	<p>The thinking capacity in making sense from the environment is inhibited by rationalisation of observations and thereby prevents processes to uncover new knowledge structures.</p> <p>Failure with leadership system responses may lead to more deliberate environmental focused learning and reconsideration of original responses, and thereby exposure to new routines of scanning and making sense of environmental feedback.</p> <p>This presents a potential disconnect from feedback from the environment, with a resultant propensity of the leadership system to act on basis of skilfulness.</p>

I consider the meaning to Leaders learn from Leaders as the leadership system's capacity to "Explore wider than knowledge already accumulated." Leadership learning requires a connectedness with the environment together with a thinking capacity to

make sense of the environment. The thinking capacity is a cognitive skill that enables appreciation of the current environment together with a realistic expectation of the future. This capacity may result in either thinking patterns of becoming more skilful or gathering wisdom. Skilfulness is a concrete response formed on the basis of what is known. Wisdom presents different insights with different interpretations, choices and consequences being uncovered, and is less concrete than a response founded on the basis of what is known. The dominant knowledge structure, whether combined with thinking patterns of skilfulness or wisdom, is a reference point to the leadership system's sense from the environment. The thinking capacity in making sense from the environment is inhibited with rationalisation of new observations, and thereby prevents processes to uncover new knowledge structures. This presents a potential disconnect from feedback from the environment.

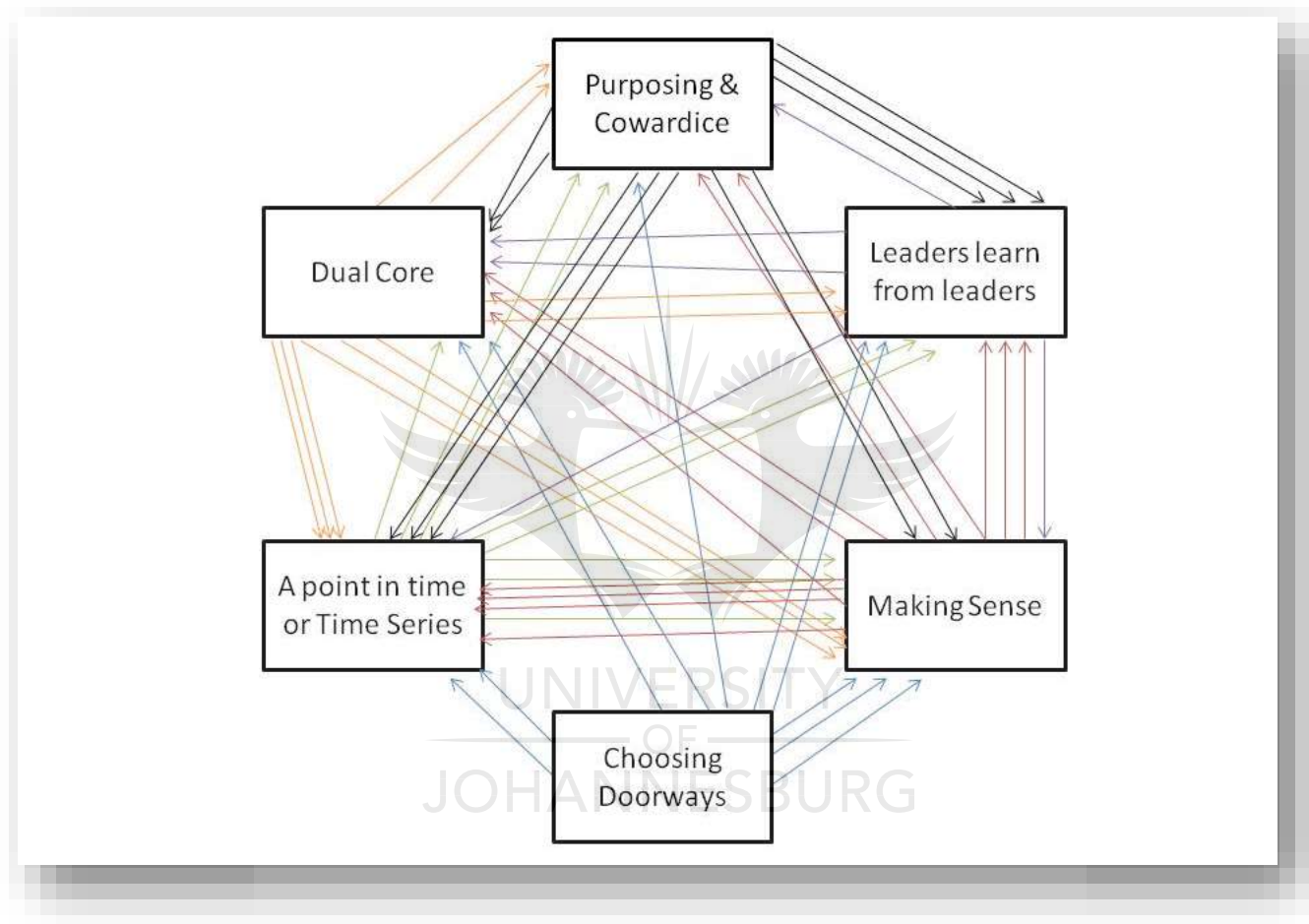
#### **4.4 CONSIDERING INTERRELATIONSHIPS TO DETERMINE CENTRAL THEMES**

I presented thematic categories in Chapter 3 as a product of open coding. I concluded with presentation of core constructs from the categories. I brought the categories into a process to consider interrelationships, making use of fishbone diagrams, as illustrated within section 4.3. This led to a conceptual meaning to categories as highlighted within that section.

I now consider, provided insights from the use of the fishbone diagrams, the dynamic of interrelationships to data findings, and not the detail thereof as before. I have an interest to understand which categories influence other most. My aim is to reduce the categories to central categories.

I created a map, as practiced by Viljoen in Martins et al. (2017) and Keevy (2018), with categories presented and interlinking arrows illustrating interrelationships. The volume of lines illustrates the extent of influence. I made use of the interrelationships that arose with the fishbone diagrams to produce the map (see Figure 4.6). It is evident that there are categories that have a relatively greater influence on other.

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**Figure 4.6 Map of interrelationship between categories**

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Tables 4.7 and 4.8 present the same picture than the map of interrelationship, however, one is in numerical fashion. Table 4.7 illustrates the frequency of influence each category has upon another. Table 4.8 provides similar data presented differently. It shows categories with the greatest effect on other, and the extent to which categories are being affected by other.

**Table 4.7 The frequency of influence of each category upon another**

	Making Sense	Leaders Learn from Leaders	Purposing & Cowardice	Dual Cores	Point in Time or time series	
Making Sense		3	2	3	4	12
Leaders Learn from Leaders	1		1	2	1	5
Purposing & Cowardice	2	3		2	3	10
Dual Cores	3	2	2		3	10
Point in Time or time series	2	2	1	2		7
Choosing Doorways	3	2	1	2	2	10
	11	12	7	11	13	

It is noticeable that the relative greatest influencers are Making Sense, Purposing and Cowardice, Dual Cores, and Choosing Doorways. The categories being influenced most are Leaders learn from Leaders, and Point in time or Time series. Therefore, I decided to single out Making Sense, Purposing and Cowardice, Dual Cores, and Choosing Doorways together with its conceptual meaning as central themes to theory development.

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**Table 4.8 Categories with the greatest influence**

Category	The effect this category has on other	The effect that other categories have to this category
Making Sense	12	11
Leaders Learn from Leaders	5	12
Purposing & Cowardice	10	7
Dual Cores	10	11
Point in Time or time series	7	13
Choosing Doorways	10	

While, as already indicated, a dynamic relation exists between the categories, I placed Choosing Doorways at the centre of Figure 4.7.

**Table 4.9: Focal categories with its conceptual meaning**

Central Category	Construct to the category upon open coding	Conceptual meaning to the central category
Making Sense	Leadership system's capability to gain insight and uncover new alternatives	Surfacing and cultivation of organisational philosophies
Purposing & Cowardice	Leadership systems learn and create shared purpose within the organisation and sector	Cultivating quality of thinking
Dual Cores	Leadership as a system create structure within often unfamiliar contexts	Cultivating vertical alignment, and Being receptive to step-up



**Figure 4.7: Three central categories**

Section 4.3. brought an understanding of interrelation with the assistance of fishbone diagrams. This brought an understanding of conceptual themes and central categories. I consider these central categories with its conceptual meaning (see Table 4.9) the basis of conceptual integration in my theory development. The table lists the central category, the central construct thereto with open coding, as well as the conceptual meaning I made from an integrated understanding of that category in relation with other categories.

#### **4.5 A INTEGRATIVE PICTURE AS NARRATIVE FROM THEMATIC CATEGORIES**

I described the use of fishbone diagrams to consider relationships between categories. I proceed to present an integrated meaning that I make from the thematic categories



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with an integrative narrative. I create this narrative with insights gained with open coding, and applying fishbone diagrams to the thematic categories with axial coding. I choose to create this integrative narrative to thematic categories, firstly, to present a whole picture I formed from data, and secondly, because I sensed apparent contradictions from data that I wish to point out, and lastly, the integrative narrative may present an opportunity to reconsider extant literature to deepen my understanding of categories.

The report in section 4.5.1 illustrate the apparent contradictions that I sensed from data. I consider these significant in light of Menon and Yao's view (2017) that organisations may hold alternative mental models. Similarly, views exist that contradictions, or paradoxes, is part of enacting leadership, as well as the development thereof (Lavine, 2014; Pearce et. al., 2019). I therefore form the opinion that apparent contradictions, or paradoxes, from data may form a significant element to leadership development systems.

### **4.5.1 Narrative from thematic categories**

A leadership system is an integrative core that creates structure by articulating organisational purpose, values and goals, which I henceforth will collectively refer to as purpose. The leadership system achieves this structure with a process of learning purpose in terms of its internal and external environments. This learning aims at achieving shared meaning to the organisation, within the organisation and the environmental context. It is a learning process in making sense of the environment and involves non-programmed decision-making. A strategic posture is formed with this process of learning and decision-making.

The afore-mentioned leadership system activity takes place, provided a conceptual view of an organisation at a highest tier as illustrated in Figure 4.8. I consider organisational purpose to be the organisation's significance of being, the role it sees itself performing in society and humanity. I consider organisational value, as it stems twofold from the highest conceptual tier. Firstly, as a position adopted concerning value distribution. These are decisions as to who are the major stakeholders, in which order they are to be served, and how each stakeholder should be served (Wallin, 2012). The second view I have to the articulation of organisational value is the

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leadership system's decision to bring about an organisational cultural system.

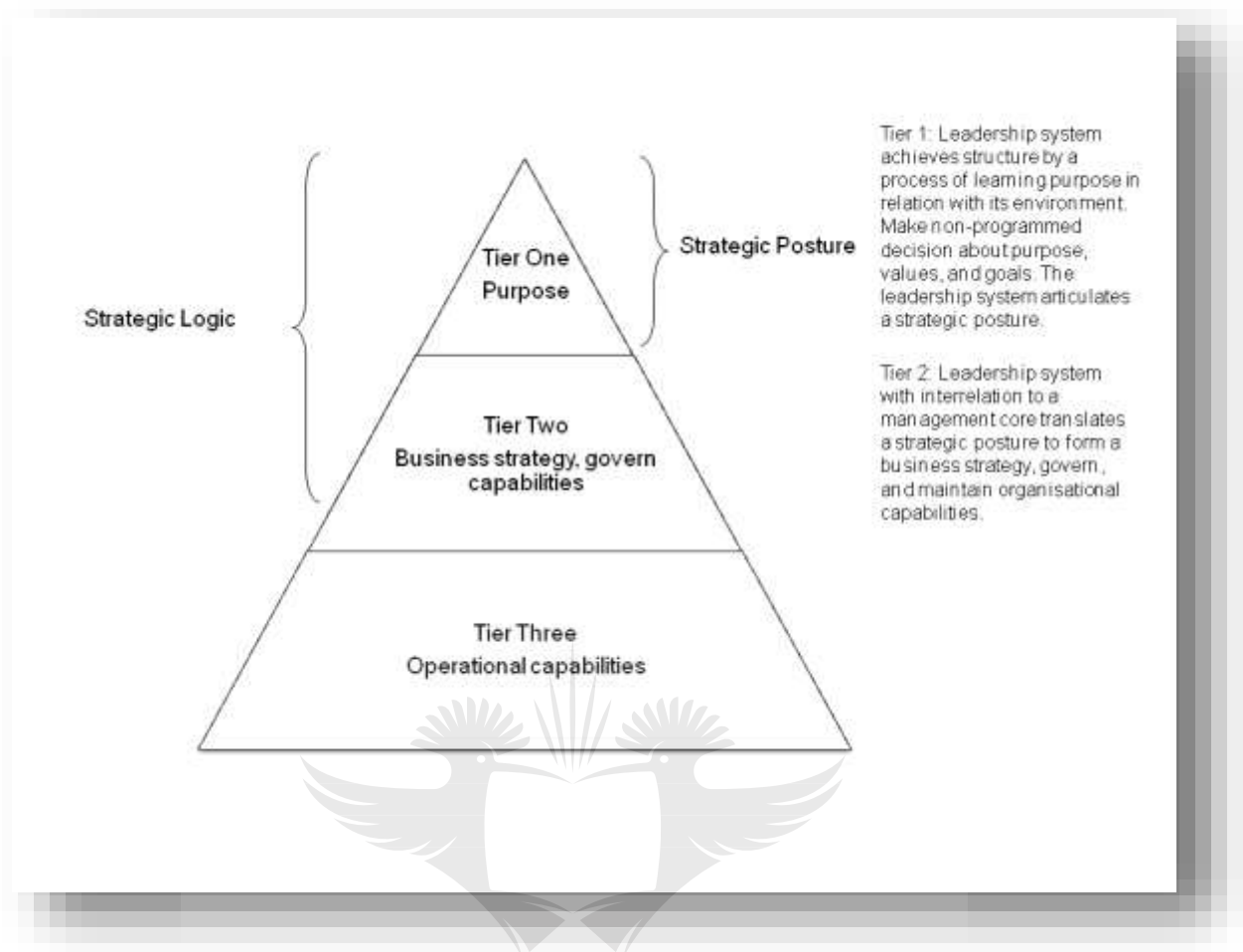
The leadership system, as integrative core, is within interrelation with a management oriented core. This dual core translates a strategic posture at another conceptual tier to the organisation, in forming a business strategy to govern and maintain organisational capabilities. The respective organisational tiers are illustrated in Figure 4.8.

The leadership that is concerned with purpose at the first tier is in context and interrelation with the organisation environment. The environment can be considered as a causal texture, where actors within the environment influence the options and choices of others. The emergence of decisions by actors continuously shapes the environment. Stacey (1996) makes reference to a different perspective to environment, which is a technical rationality. Stacey (1996) suggests that an environment with a technical rationality perspective is considered to be uncomplicated with few variables to change. This environment can be understood by environmental scanning and logical reasoning within set rules to a logic and options for action.

The learning process of purposing is a leadership system capacity that may be collective, outward, people-oriented, and forward-looking. It serves in creating meaning across boundaries. The collective, outward and people-oriented learning provides meaning for the individual within the organisation, and the organisation within society. The meaning provides context to goals and achievement. It lays a basis for inclusive leadership and interdependent work, emotional interrelation between stakeholders and the future, and stimulates innovation.

The forward-looking capacity to learning considers a preferred future with synthesis of understanding past events, action and current contextual variables. The process of learning purpose, pursued outwards across boundaries, results in a leadership system as a causal actor within the environment. Outward, collective and forward-looking purposing drives whole system meaning and knowledge structures concerning values and principles. The afore-mentioned, through engagement, grounds partnering, decision-making and responsibility. Purposing by engagement is one of its forms. It may however, also take the form of consultation as incremental decision process of testing and adaptation.

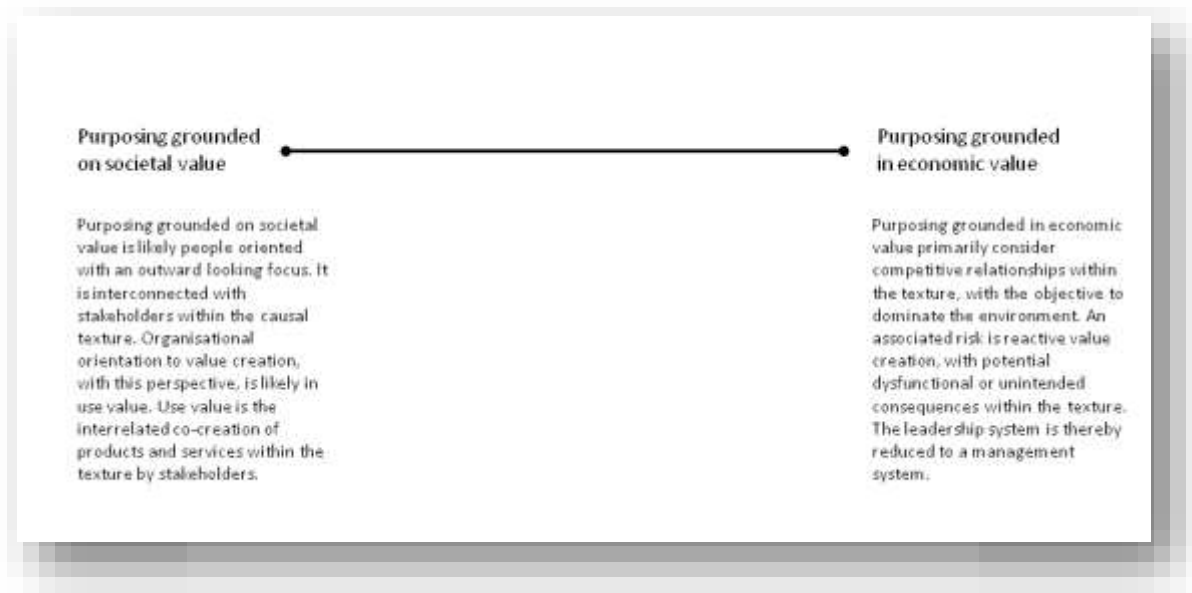
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**Figure 4.8: Conceptual stratification of an organisation**

A value set regarding the achievement of organisational value is brought into the leadership system in learning purpose. This value set suggests a contradiction to organisation's value-creating interrelation with its environment as presented in Figure 4.9. A spectrum of societal value is placed on the one side and economic value at the other side. The learning of purpose may be grounded on a value orientation economic value and societal value.

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**Figure 4.9: Contradictory value set that is related to the organisation's value creating interrelation with its environment**

These value orientations affect purposing. Purposing grounded on societal value is considered as being more outward-looking, collective and people-oriented. It is interconnected with stakeholders with the environment implied to be a causal texture. Organisational value creation attempts to uncover and make use of opportunities for interrelated stakeholder co-creation of products and or services. This is the notion of use value. Purposing grounded in economic value has emphasis competitive relationships with the objective to dominate the environment. An associated risk, within a complex and dynamic environment, is reactive value creation, with potential dysfunctional or unintended consequences within the environment. The leadership system is thereby reduced to a management system.

Purpose is a basis for choices to organisational strategic posture, as well as a broader concept of strategic logic. I consider strategic posture to be a strategy perspective held by leadership that, in turn, frames the generation of further strategic options and choices. I hold possible strategic postures to be (Ungerer et al. 2016; Selsky, Goes & Baburoglo, 2007):

- (a) Fitting or adapting to the environment, which is likely to be following or reactive to that environment.

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- (b) A posture with a strong inward-looking capability and emphasis, which continually seeks internal reinvention, to compete with organisationally unique capabilities.
- (c) A posture that focuses on collaborative exploits within an environment, which goes beyond the aim to denominate a market, but to be an overt casual actor within the environment.

The interaction between the leadership and management systems, the Dual Cores, brings about a strategic logic. This is a learning process informed by purpose, strategic posture and sense made from internal and external environments. Strategic logic is a broader concept, but more concrete than strategic posture. It reflects the sense the organisation made from its environment, and combines the already mentioned purpose and strategic posture with a consequent business strategy. An element to the business strategy is possible strategy levers to bring about value.

Leadership learning is purposeful from one leader to another. It is a dynamic organisationally internally and externally directed learning about the on-going organisation. The learning, as already referred to, has a forward-looking capacity in the form of awareness of a preferred future and a synthesis of understanding past events and action, as well as current contextual variables.

The learning takes place with a perspective to the environment. The environment can be considered as causal texture where actors influence options and choices of other actors, and where the emergence of decisions by self and other actors continuously shapes the environment. Stacey (1996) makes reference to a different perspective to environment, which is a technical rationality. Stacey (1996) suggests that an environment, with a technical rationality perspective, is considered uncomplicated with few variables to change, and that it can be understood by scanning and logical reasoning with set rules to logic and options for action. This polarity to perspective to environment is contrasted in Figure 4.10.

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**Figure 4.10: Organisational views of environment that frame leadership learning**

Leadership learning is organisationally internally and externally directed. The learning may have one focus or a combination of foci. The first interest is leadership traits, competence or behaviour, with the second the context that forms leadership in the organisation. The first mentioned drives learning of management or leadership within the organisation. The last mentioned drives learning of what forms organisational leadership. This polarity to leadership system's learning interest is contrasted in Figure 4.11.

Learning about management or leadership within the organisation relies on practices to single out effective behaviour and the identification of gaps in light of the overall compared with the ideal organisational strategy (Leskiw et al., 2007). The strategic value rests with the ability to single out the strategically most significant gaps. Learning is thus ultimately used to close skills gaps as the organisation embarks on strategy implementation (Luoma, 2000). Learning relies on models and techniques presented within curricula: a capacity to transfer others' wisdom to own context.

Learning about what forms organisational leadership relies on practices of creating meaning; developing collective capacities; making use of networks; achieving cooperation and collaboration; and learning new and different ways by making use of user-generated knowledge. This is a capacity to think and orient oneself in context.

The causal nature of the environment, where actors continually shape the environment

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and thereby influence options and choices, places demands on the capability and capacity in learning. The causal dynamic to the environment requires more than an accumulation of knowledge, skills or competencies to create responses.



**Figure 4.11: Different focus on leadership system learning**

The dynamic's casual affect requires leadership capacity and capability in complex, systemic and interdependent thinking. The learning capability is influenced by a dominant knowledge structure. The dominant knowledge structure serves as a reference point to the system's understanding or sense from the environment. The leadership system's thinking capacity is practiced within that existing knowledge structure, which presents potential bias to problem-solving; future-oriented views and appreciation of perceived consequences to choices. The thinking capacity, a cognitive skill that enables appreciation of the current environment, with its variables and emerging variables, together with a realistic expectation of the future, is inhibited by rationalisation of observations. This rationalisation prevents challenges to existing and surfacing of new knowledge structures. This presents potential failure in making sense from the environment at any tier, and between tiers of the organisation. It is in light of the afore-mentioned that the leadership capacity is required to detach from and cross to another knowledge structure.

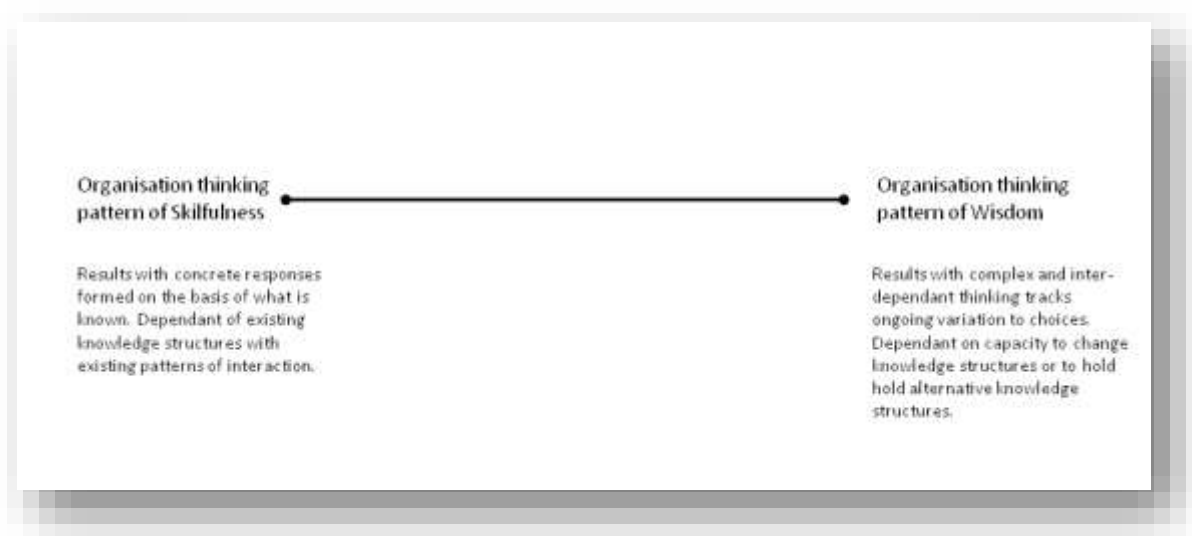
Existing knowledge structures with associated patterns of interaction or activity may inhibit sense from the environment at any tier, and between tiers. This results in an inability to change familiar ways in light of new environmental demands. The



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leadership system requires the capacity in making sense to adopt different knowledge structures. A leadership system may, however, apart from changing a single knowledge structure, hold alternative knowledge structures. Alternative knowledge structures present different interpretations, potential choices and consequences to inform consideration of the environment. This capacity may lead to apparent contradictory, but complementary, change. Risk is not in the apparent polarity to the alternative knowledge structures, but with a leadership system's inability and lack of capability to shift between knowledge structures in the face of required change.

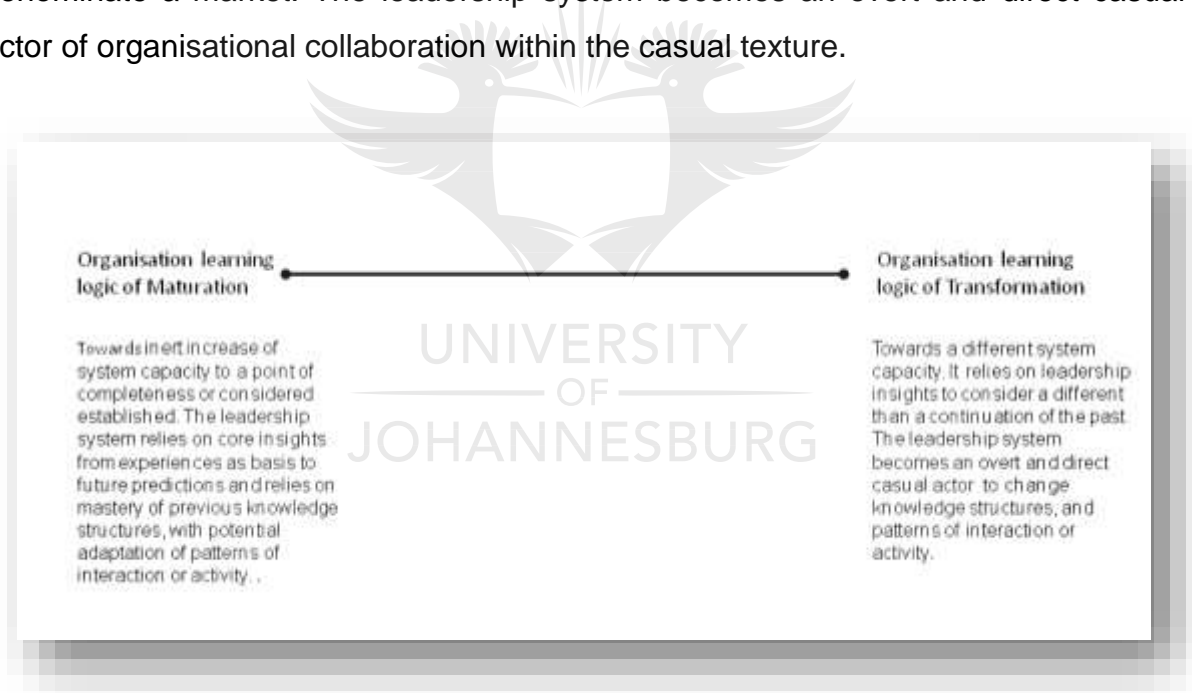
The leadership system's thinking capacity and associated capability to shift between mental models may be viewed as patterns of becoming more skilful or of gathering more wisdom. I consider skilfulness as a concrete response formed on the basis of what is known. Wisdom presents complex and inter-dependant thinking tracks of on-going variation to choices that are available to leaders as the causal texture develops. It allows different insights with different interpretations, choices and consequences being uncovered. It is however less concrete than a response founded on the basis of what is known. The leadership system's capability to make use of accumulated knowledge, skills and competence contributes to surface choices to be made, but as an input and not substitute to the leadership system's capability in complex and inter-dependant thinking. This contrast to leadership system's thinking capacity is illustrated in Figure 4.12.



**Figure 4.12: Patterns to organisational thinking**

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I relate these patterns of becoming more skilful or wise to two logics to learning. These are polar logics of maturation and transformation, and are contrasted in Figure 4.13. Maturation logic presents an increase of system capacity to a point of completeness or considered established. It relies on core insights from experiences as a basis to future predictions and relies on mastery of previous knowledge structures with potential adaptation of patterns of interaction or activity. This logic is likely to manifest in strategy practices to fit or adapt to the environment, and/or emphasis on internal reinvention. The leadership system thus represents an organisational agency of consultation with incremental processes of testing and adaptation. Transformation to a different system capacity is another logical stance. It relies on leadership insights to consider a future different from a continuation of the past. This disposition makes use of collaborative exploits within the environment, and it goes beyond the aim to denominate a market. The leadership system becomes an overt and direct casual actor of organisational collaboration within the casual texture.



**Figure 4.13: Logics to organisational learning**

Environments may necessitate organisational change in patterns of interaction, or knowledge structure. Sanchez (2012) provides four forms of change that may be induced. Sanchez (2012, pp. 11, 17, 29) points to a Stable Environment where change is likely to be incremental improvements; an Evolving Environment that requires new approaches to coordinating current resources and capabilities where change is likely

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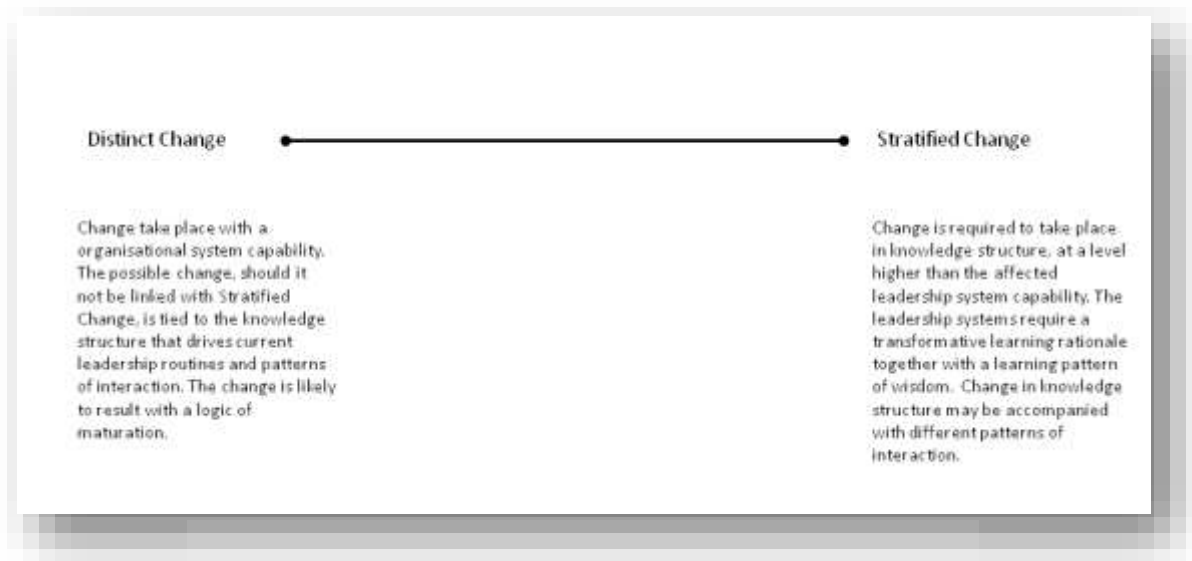
to be new interfaces and configurations; an Evolving Environment that requires new resources and capabilities where change is likely to involve new capabilities; and lastly a Dynamic Environment where the rate of change is high with the nature of change and capabilities required uncertain, and where change is likely to introduce new capabilities and interfaces in terms of alternative future scenarios. Porras and Silvers (2005, pp. 84-85) suggest categories of change that integrate

organisational paradigm and individual cognitive change; which are: “Alpha change: change in perceived levels of variables within a paradigm without altering their configuration...; Beta change: change in people’s view about the meaning of the value of any variable within an existing paradigm without altering their configuration...; Gamma (A) change: change in the configuration of an existing paradigm without the addition of new variables...; Gamma (B) change: replacement of one paradigm with another that contains some or all new variables...”

Data suggests that change has to take place in knowledge structures, at a level higher than the affected leadership system capability (Tiers 1, 2 and 3). Possible change, should the afore-mentioned stratified change fail to take place, would be tied to the knowledge structure that drives current leadership routines in response, and is likely to end with becoming more skilful. Organisational change, with a transformative rationale to learning, includes change in knowledge structure at levels higher than the affected leadership system capability, and has a wider affect than the development of an immediately affected capability. These patterns to change are contrasted in Figure 4.14.

There is a capacity of authenticity that transcends tiers to the leadership system. Authenticity to the leadership system, implies leadership contributions that are truthful to their base motives. Leadership contributions that are truthful or authentic to personal values and conviction develop credibility, respect and trust in building networks of collaborative relationships. A leadership climate of authenticity becomes part of the organisation’s identity. It is not a function of organisational learning, but a prerequisite. Learning in the absence of authenticity, is likely to deepen “lies”; an authentic facade can be presented, but the base motive remains self-interest.

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**Figure 4.14: Patterns to change**

The leadership system, at the first tier, drives learning of purpose. The purpose, values, and goals that manifest provide a basis for choices to the organisational strategic posture. Choices made, at the first tier, concerning strategic posture and posture inform further tiers of the organisation. The capacities to learning remain applicable to the leadership system's learning at the second and third tiers.

Learning and decision-making at the second leadership tier, have express focus to value creation in light of the organisational purpose and strategic posture. Learning and decision-making result in a business strategy pointing to value-creating opportunities, priorities and shifts. Decisions frames resource allocation and operations in value-creating capabilities. I consider the combination of organisational purpose, strategic posture and business strategy to form the strategic logic of an organisation.

The interrelated Tiers 1 and 2, which provide the organisational strategic logic form a core to the leadership system. It aims for long-term sustainability with its values, goals, strategic posture and business strategy. It articulates the required organisational capabilities, culture, the type of strategy to be executed and the collective leadership capabilities. The combination of Tiers 2 and 3 which governs form, and develops organisational capabilities forms the core of the management system. The second tier is a common denominator or link between Tier 1 that forms purpose and shapes a

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causal texture by non-programmed decision-making, and Tier 3 that represents patterns of activity that are collective, repeatable and imbedded to reliably bring about desired results.

Various management techniques may be employed to determine value-creating opportunities and priority. The use of a variety of techniques does not form part of this thesis. I do have an interest with the type of strategy levers potentially employed with business strategy. Literature presents, for illustration, five potential strategy levers. I use this range of strategy levers as illustration of typical options to create business value. These five potential strategy levers, as deduced from Ungerer et al. (2016), Sanchez (2012), Selsky et al. (2007), and Hazy (2006), are:

- Making the most of current opportunities by incremental improvements to efficiency within the system environment;
- Making use of existing capabilities to create new opportunities;
- Creating new opportunities by using new capabilities based on existing resources;
- Creating opportunities by new capabilities based on new resources; and
- Creating opportunities by new capabilities based on new interfaces within and between organisations.

The learning capacity and capability at the second tier has an express focus to value creating opportunities and priority. This implies, as with the leadership system at Tier 1, that learning patterns, skilful or wisdom, and rationale of maturation or transformative, are applicable. These capabilities are defined and influenced by higher tier knowledge structures to thinking patterns and learning logics with changes dependant thereto. Change has firstly to take place in knowledge structure at a level higher than the affected leadership system capability. Environmental responses would be tied to leadership routines that end with becoming more skilful if the aforementioned stratified change fails to take place. This interplay within and between tiers are of significance as changes in environment may bring about more complex business strategies that require larger capacity to function within a complex environment and organisational culture to reflect a complexity that is similar to the organisational strategy. Changes in strategy complexity do not only require interplay

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of thinking patterns and learning logic within and between tiers. It requires discretion in leadership in decision-making.

The cascade of differentiated decision-making capacities and associated discretion thereto is tied to an organisational upper limit. This organisational upper limit to decision-making capacities and associated discretion are framed by the strategic complexity of the organisation. These are the decision-making capacities required to the level of strategy complexity of the organisation. An actual level of discretion exists. Capacity may exist to exercise the necessary discretion in more complex environments, but real discretion is not permissible, as more complex capacity is displaced. Decision-making discretion is not only influenced by organisation structure and policy, but also, for example, by large measures of regulation that reduces discretion.

The leadership system can exercise a choice to allow the development system to interface primarily with the organisation at a strategic, leadership core level, or at the level of an operational, management core. Priority with strategic interface is the articulation of organisation values, the culture the organisation wishes to enable, collective leadership capability required, competencies, and behaviours required in light of the strategy to be implemented. An operational interface, even though it may be contextually valid, reduces the developmental system's function to "fix what is broken" with an incidental outcome of "the right type of leader." An operational level choice is typically a default position when the strategic level choice is not pursued.

### **4.6 A VIEW OF CONSIDERATIONS TO THE DESIGN OF A LEADERSHIP DEVELOPMENT SYSTEM**

The insight gained from understanding the thematic categories in terms of others brought different meanings. These different meanings are a shift from thematic to a conceptual understanding of categories. I consider the meaning made to the respective categories prior to the application of the fishbone diagram to be a thematic meaning, which is limited to a category in isolation. The product to the application of the fishbone diagrams is a conceptual meaning, which is inclusive of influences from other categories thereupon.



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I consider the integrated meaning to central categories to be the conceptual basis to my theoretical framework that is being developed. Note that even though I attribute different meanings to the central categories that I maintain the thematic category names. The integrated meaning to the central categories is provided in Table 4.10.

**Table 4.10: Integrated meaning to the central categories**

Central Category	The Conceptual Meaning	Basic properties to my understanding to this category
Making Sense	Surfacing and cultivation of organisational philosophies	<p>Organisation meaning created across boundaries.</p> <p>A common purpose is to surface and cultivated.</p> <p>A common knowledge structure should exist concerning the organisation's value-creating interrelation with its environment.</p> <p>A common knowledge structure should exist to the strategy posture and associated logic held by the leadership system that, in turn, frames the generation of further options and choices.</p> <p>This implies, as with the leadership system at Tier 1, that learning patterns, skilful or wisdom, and rational of maturation or transformative, are applicable.</p> <p>Articulate the required organisation <i>capabilities, culture, the type of strategy to be executed</i>, and the collective leadership capabilities.</p> <p>Authenticity that transcends tiers to the leadership system, and the organisation in context.</p>
Purposing & Cowardice	Cultivating quality of thinking	<p>A individual and collective thinking capacity, a cognitive skill that enables appreciation of the current environment, with its variables and emerging variables, together with a realistic expectation of the future.</p> <p>A forward looking capacity in awareness to, and synthesis of understanding of past events and action, current contextual variables, with a preferred future.</p> <p>A focus with leadership system learning on the context that forms leadership in the organisation.</p> <p>A leadership system capability and capacity of complex, systemic, and interdependent thinking.</p> <p>A capacity to detach from a dominant knowledge structure and patterns of interaction.</p> <p>A capacity to detach other conceptual tiers to the organisation, interrelation between tiers, from a dominant knowledge structure and patterns of interaction.</p> <p>The complexity of the organisational logic affect the learning and decision-making capacity required. Changes in strategy complexity require interplay of rational in, and patterns to learning within and between tiers.</p> <p>These capabilities are defined and influenced by, with changes thereto dependant on, higher tier knowledge structures to learning patterns, skilful or wisdom, and rational of maturation or transformative, are applicable.</p>



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Central Category	The Conceptual Meaning	Basic properties to my understanding to this category
Dual Cores	Cultivating vertical alignment	<p>A capacity and capability of interaction between the leadership and management systems, the Dual Cores, to the sense the organisation made from its environment and combines the already mentioned purpose and strategic posture with a consequent business strategy to bring about a strategic logic.</p> <p>Articulate the required organisation capabilities, culture, the type of strategy to be executed, and the collective leadership capabilities.</p> <p>Alignment between conceptual tiers one and two of the organisation, which provide the organisational strategic logic, in values, goals, strategic posture, and business strategy.</p> <p>Learning and decision making, at the second organisational tier, to value creation, in light of the organisational purpose and strategic posture.</p> <p>Alignment between conceptual tiers two and three to govern, form and develop organisational capabilities.</p> <p>Decisions concerning value creating opportunities and priority frames resource allocation and operations in value-creating capabilities.</p> <p>A capability to the leadership system to learn desired leadership traits, competences or behaviours.</p> <p>More complex business strategies require different capacity and capability presented within the organisational culture to reflect a similar complexity than the organisational strategy.</p>
	Being receptive to step-up	<p>The leadership system capacity to change knowledge structures, and possibly to hold alternative knowledge structure.</p> <p>The leadership system's thinking capacity, and associated capability shift between mental models, as patterns of either becoming more skilful or of wisdom.</p> <p>A rationale for learning as maturation is, which is an inert increase of system capacity to a point of completeness or considered established. Another rationale for learning is transformative towards a different system capacity.</p> <p>The complexity of the organisational logic affect the learning and decision-making capacity required. Changes in strategy complexity require interplay of rational in, and patterns to learning within and between tiers.</p> <p>Change to organisational knowledge structure (Gamma Change, (Porras &amp; Silvers (2005)) has first to take place in, at a level higher than the affected leadership system capability: differentiated change.</p> <p>Differentiated change requires transformative learning rationale with leadership systems together with a learning pattern of wisdom.</p> <p>Possible change, should the afore-mentioned differentiated change not take place, are tied to the knowledge structure that drives current leadership routines. Change is likely to end driving becoming more skilful. This dynamic regardless of transformative learning rationale with leadership systems together with a learning pattern of wisdom.</p>

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Central Category	The Conceptual Meaning	Basic properties to my understanding to this category
		<p>The learning capability, at a higher tier, with patterns, skilful or wisdom, and rational of maturation or transformative presents an interplay of patterns to and rational in learning within and between tiers. More complex strategic logics or business strategies require different capability, thus a different interplay within and between tiers.</p> <p>The complexity of the strategic logic, and changes thereto, do not only require an interplay of patterns to and rational in learning within and between tiers, but requires discretion afforded to leaders in decision making.</p> <p>The Structural Doorway advance consideration to decision-making capacity required and discretion afforded for decision-making within a leadership system. The cascade of differentiated decision-making capacities and associated discretion thereto is tied to an organisational upper limit. The requirement to an upper limit to individual and collective thinking capacities and associated discretion are guided by the strategic complexity of the organisation strategy logic.</p> <p>Capacity may exist to exercise the necessary discretion in more complex environments, but real discretion is not permissible, that more complex capacity is displaced.</p>

The conceptual meaning to the central categories assists in achieving a point of conceptual reduction, described by Locke (2001 p. 52) as a sense of a “commitment to tell a particular kind of story.” The conceptual meaning to the central categories presents major areas of consideration to the design of a leadership development system. It furthermore allows a funnelling of focus to its properties, which I consider to be either considerations to the design, principles in design, or enablers to a development system. I provide my interpretation of the properties as either considerations to the design, principles in design, or enablers in Table 4.11. I considered considerations to be variable; principles to present beliefs to a development system; and enablers as properties to a development system that is variable but has an overall effect on the development system regardless the choices made to the variable considerations.

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**Table 4.11: Considerations to the design, principles to and enablers of a development system**

<p>Considerations to the design of a leadership development systems, stated as questions.</p>
<ul style="list-style-type: none"> <li>• What is the organisational orientation to value creation in its relationship with its environment?</li> <li>• What are the strategy levers that frame the organisational choices in value creation?</li> <li>• What is the pattern to the leadership system's thinking capacity?</li> <li>• What is the logic to organisation learning?</li> <li>• What is the focus to the leadership learning: leadership in the organisation, or leadership of the organisation?</li> <li>• Does the organisation have the capacity to detach from dominant knowledge structures?</li> <li>• Does the organisation have the capacity to detach from dominant knowledge structures, between tiers of the organisation?</li> <li>• Do leaders have discretion to make decisions in light of the strategy and learning logic to the organisation?</li> <li>• What is the required lower limit of collective and individual thinking capacity required provided the strategy logic of the organisation?</li> </ul>
<p>Principles to the design of leadership development systems</p>
<ul style="list-style-type: none"> <li>• The process of learning purposing surfaces, with organisational tiers one and two, a strategic posture with subsequent strategic logic. It presents an organisational orientation to value creation and model of creating value.</li> <li>• An individual and collective thinking capacity is cognitive skill applied that enables appreciation of the current environment, with its current and emerging variables, together with a realistic expectation of the future.</li> <li>• Leadership system's thinking capacity may either be, or a combination of, patterns being skilful or wisdom. The learning capability may either be, or a combination of, logics of maturation or transformation.</li> <li>• The leadership system's thinking capacity is a basis to shift between mental models or knowledge structures, as patterns of either becoming more skilful or of wisdom.</li> <li>• A forward looking thinking capacity is an awareness to and synthesis of meaning to past events and action, current and emerging contextual variables, with a preferred future and can be in patterns of being more skilful or of wisdom.</li> <li>• The complexity of the organisational strategy logic affect the learning and decision-making capacity required. Changes in strategy complexity require a changing interplay to learning logics and the leadership system's thinking capacity.</li> <li>• Change to organisational knowledge structure has first to take place at a level higher than the affected leadership system capability for the change to be effective.</li> <li>• More complex business strategies require different capacity and capability presented within the organisational culture to reflect a similar complexity than the organisational strategy.</li> <li>• Leadership system's thinking capacity may either be, or a combination of, patterns being skilful or wisdom. The learning capability may either be, or a combination of, logics of maturation or transformation.</li> <li>• Leadership learning and decision making to value creation, at the second organisational tier, is in light of the organisational purpose and strategic posture. Alignment between conceptual tiers two and three to govern, form and develop organisational value-creating capabilities. Decisions concerning value creating opportunities and priority frames resource allocation and operations in value-creating capabilities.</li> </ul>

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- The cascade of differentiated decision-making capacities and associated discretion thereto is tied to an organisational upper limit. The requirement to an upper limit to individual and collective thinking capacities and associated discretion are guided by the strategic complexity of the organisation strategy logic.

### Enablers of leadership development systems

- A leadership system has to be capable to articulate the required organisation capabilities, culture, the type of strategy to be executed, and the collective leadership capabilities.
- An authenticity to the leadership systems that transcends tiers to that leadership system, and the organisation in context.
- A leadership system has decision-making capacity and discretion to make decisions

In addition to considering detail and dynamic interrelationships, I have constructed an integrated narrative from my understanding of interrelationships between thematic categories. This integrated narrative contributed to surface elements that have apparent contrasts. I consider these contrasts with their potential different configurations to form logic in the design of a development system.

## 4.7 SUMMARY

In the preceding sub-sections, I considered dynamic aspects to interrelationship between categories. I did so by making use of fishbone diagrams and a map of interrelationships. I created, in addition, an integrated narrative from thematic categories based on my understanding of interrelationship.

The map of interrelationships shows categories Making Sense; Purposing and Cowardice; and Dual Cores to be central as they have the greatest relative influence on other categories. I conclude by using the mentioned categories as bases to further theory development.

The insight gained from understanding the thematic categories in terms of others brought different meanings. These different meanings are a shift from thematic to a conceptual understanding of categories. I consider the integrated meaning to central categories to be the conceptual basis to my theoretical framework that is being developed.

The conceptual meaning to the central categories presents major areas of consideration to the design of a leadership development system. It furthermore allows

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a funnelling of focus to its properties, which I consider to be either considerations to the design, principles in design, or enablers to a development system.

Lastly, the integrated narrative from data surfaced elements that have apparent contrasts. I consider these contrasts with their potential different configurations to form logic in the design of a development system.



## CHAPTER 5

### AN EMERGING THEORY

#### 5.1 INTRODUCTION

I presented my research findings, grounded in field data, as a narrative in Chapter 3 (Bloomberg & Volpe, 2008). I referenced extant literature that assisted in expanding categories (Thornberg, 2012; Mills et al., 2006; Suddaby, 2006). I reported axial coding in Chapter 4, where I considered interrelationships between categories to achieve a conceptual understanding (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001). It involved the use of fishbone diagrams for detail consideration of interrelation; a map of interrelationships to understand the dynamics of interrelationships; and an integrated narrative that pointed to apparent contrasts in data. The map interrelationships suggest categories Making Sense; Purposing and Cowardice; and Dual Cores as central categories. This frame of central categories forms the basis to considerations to the design of a leadership development system.

The assimilation of the central categories into a theoretical framework is a product of selective coding, which involves assimilation of theoretical or conceptual categories and relationships towards theory (Strauss & Corbin, 1990; Walker & Myrick, 2006; Bhattacharjee, 2012). It is similar to axial coding (Walker & Myrick, 2006), but more abstract, and implies the integration of categories and relationships towards a theory (Walker & Myrick, 2006; Bhattacharjee, 2012).

I present, with this chapter, my assimilation of the central categories and its properties into a theoretical frame. (Locke, 2001) This is guided by the research purpose to create organisational leadership development architecture, as a fundamental framework to an intentional and future-oriented leadership development system. Architecture is, as discussed in section 1.6.4, a framework of considerations that illustrate variations to a systems alignment with organisational strategic context and that highlights ways in which variations affect the system and function.

I consider the frame of central categories the basis to considerations in the design of

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an intentional and future-oriented leadership development system. These central categories with their properties present; (a) a frame of considerations to a leadership development system; (b) principles; and (c) development system enablers as already presented with section 4.6. I consider contrasting elements that surfaced from the categories, as described in section 4.5, as elements of variability to properties and present it as choices that affect the design of a system for the development of organisational leadership.

### **5.2 TOWARDS A THEORETICAL FRAME: FOUR DEVELOPMENT SYSTEMS**

The conceptual categories Making Sense; Purposing and Cowardice; and Dual Cores surfaced to be central categories. They have the greatest relative influence on other categories. I proceed to discuss my view to these categories as basis to the theoretical frame.

Making Sense proved to be a central category. I attributed a conceptual meaning to Making Sense with axial coding. The conceptual meaning is: The leadership system's capability to surface and cultivate organisational philosophies.

The integrative narrative surfaced apparently contrast-related to Making Sense. This relates to orientations of the organisation's value creation relative to its environment. I refer to one orientation as causal interdependence, another competitive dominance. This contrast is reflected in Table 5.1. The orientation adopted by a leadership system underlies the process of learning purpose and the development of strategic posture and logic.

Another central category is Purposing and Cowardice. I attributed a conceptual meaning to it after considering it in terms of other categories. The conceptual meaning thereto is: The leadership system's capability to cultivate quality of thinking.



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**Table 5.1: Orientations to the organisation's value-creating interrelation with its environment**

Purposing grounded on causal interdependence	Purposing grounded on competitive dominance
Purposing grounded on societal value is likely people-oriented with an outward looking focus. It is interconnected with stakeholders within the causal texture. Organisational orientation to value creation, with this perspective, is likely in use value. Use value is the interrelated co-creation of products and services within the texture by stakeholders.	Purposing grounded in economic value primarily consider competitive relationships within the texture, with the objective to dominate the environment. An associated risk is reactive value creation, with potential dysfunctional or unintended consequences within the texture. The leadership system is thereby reduced to a management system.

A contrast to Purposing and Cowardice is patterns to the leadership system's thinking capacity; and associated capability shift between knowledge structures. The patterns are either to become more skilful or a pattern of wisdom. I consider skilfulness as a concrete response formed on the basis of what is known. Wisdom presents complex and inter-dependant thinking that tracks on-going variation to choices as the causal texture develops. The said contrast is presented in Table 5.2.

**Table 5.2: Patterns to the leadership system's thinking capacity**

Leadership system's thinking capacity patterned to Skilfulness	Leadership system's thinking capacity patterned to Wisdom
Results with concrete responses formed on the basis of what is known. Dependant on existing knowledge structures with existing patterns of interaction.	Results with complex and inter-dependant thinking tracks on-going variation to choices. Dependant on capacity to change knowledge structures or to hold alternative knowledge structures.

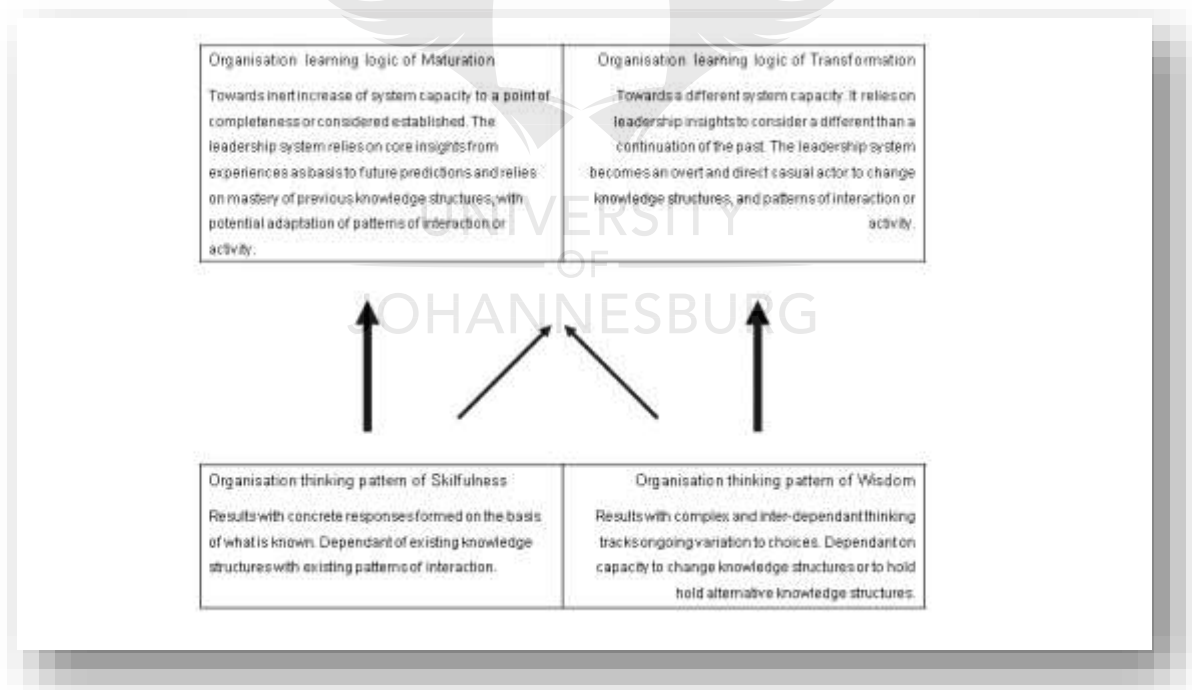
The above patterns appear closely related to contrast to logics in leadership system learning. Last-mentioned are logics of maturation, or transformation, which is central to the conceptual meaning of Dual Cores: The leadership system being receptive to step-up. The said contrast is presented in Table 5.3.

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**Table 5.3: Logics to organisation learning**

Organisation learning logic of Maturation	Organisation learning logic of Transformation
Towards inert increase of system capacity to a point of completeness or considered established. The leadership system relies on core insights from experiences as basis to future predictions and relies on mastery of previous knowledge structures, with potential adaptation of patterns of interaction or activity.	Towards a different system capacity. It relies on leadership insights to consider a different than a continuation of the past. The leadership system becomes an overt and direct casual actor to change knowledge structures, and patterns of interaction or activity.

I consider the meaning and associated contrast to Purposing and Cowardice to underlie that of Dual Cores. It is my view that Skilfulness and Wisdom underlie Maturation and Transformation, and that Maturation rely on Skilfulness with part Transformation. Transformation relies on a pattern of Wisdom, with part Skilfulness. This interrelation is reflected with Figure 5.1.



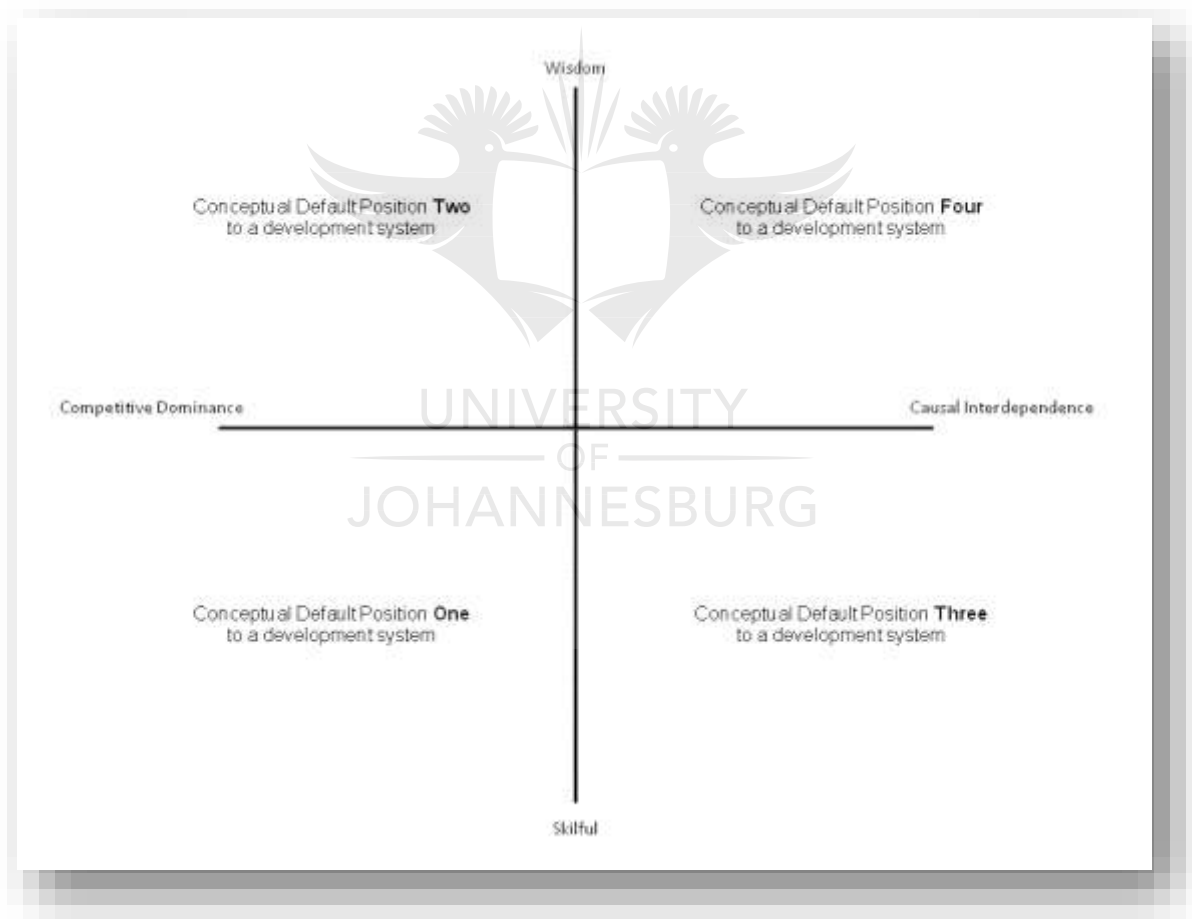
**Figure 5.1: Skilfulness and Wisdom to underlie Maturation and Transformation**

My interest with the central categories with its conceptual meaning, and contrasts is to create structure to a theoretical frame. I single out Making Sense, and Purposing and Cowardice to position it in graphic relation to each other, as illustrated with Figure

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5.2. This forms a component to the emerging theoretical framework. Purposing and Cowardice, with patterns to leadership system's thinking capacity form a vertical axis. Making Sense, in contrast with orientation in value creation forms a horizontal axis.

The conceptual categories placed in relation with one another presents four quadrants. Each quadrant presents a different character to a leadership development system in its drive in leadership development. That character leans to combinations to organisational disposition to value orientation; and patterns to leadership system's thinking capacity. These four leadership development systems form conceptual defaults to development systems. Sections 5.2.1 to 5.2.4 describe the character of the development systems.



**Figure 5.2: Focal categories Making Sense, and Purposing and Cowardice in graphic relation to each other**

### **5.2.1 Development System One: Strong Frame**

Default Position One is characterised by: (a) a Competitive Dominance value orientation in value-creating relation with the environment; and (b) leadership system's thinking capacity patterned to Skilfulness. The Competitive Dominance value orientation considers competitive relationships within the environment with the objective to dominate. A leadership system's thinking capacity patterned to Skilfulness focuses on concrete responses formed on the basis of what is known, with reliance on existing knowledge structures with existing patterns of interaction.

Thinking capacity patterned to Skilfulness drives learning logic of Maturation. This implies inert increase of system capacity to a point of completeness or it considered established. The leadership system relies on core insights from experiences as bases to future predictions, and relies on mastery of previous knowledge structures.

Leadership learning is to be dynamic with organisationally internal and external directed learning. It relies on a forward-looking capacity in awareness, synthesis of understanding of past and present events and action with contextual variables and a preferred future. Competitive Dominance, with this development system, forms the basis to meaning of a preferred future, together with Maturation focus in learning. This combination presents a strong frame to knowledge structures and patterns of interaction to a point of completeness.

Learning takes place with a view to the environment, in light of the strong frame in knowledge structures and patterns of interaction, as technically rational. The environment is considered simple with little variables to change. It can be understood with management techniques such as environmental scanning; and logical reasoning with set rules to logic and options for action (Stacey, 1996).

The leadership system learning focus is with management and leadership traits, competence and behaviour to become more skilful in Maturation. This focus remains with its dominant knowledge structure, and challenges the system for greater efficiencies. Associated risk is reactive value creation, with potential dysfunctional or unintended consequences within the environment. This reduces the leadership system to a management system.

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Organisational change, considering thinking capacity patterned to Skilfulness with logic of Maturation is predominantly distinct change. Change takes place with an organisational system capability and is likely to reinforce the logic of Maturation. Change is tied to the knowledge structure that drives current routines and patterns.

The dominant organisational philosophies within this development system is Competitive Dominance as orientation to value creation; leadership system's thinking capacity patterned to Skilfulness; learning logic of Maturation; with Competitive Dominance the basis of meaning of a preferred future. The environment is viewed as technically rational in which the system capacity wishes to dominate; with organisational learning focus on leadership traits and competence of behaviour aimed at becoming more skilful to achieve efficiency. Change takes place with an organisational system capability and is tied to knowledge structures that drive current leadership routines and patterns of interaction.

### **5.2.2 Development System 2: In Transit**

Conceptual Default Position 2 is characterised by (a) Competitive Dominance as value-creating orientation; and (b) a leadership system's thinking capacity patterned to Wisdom. The orientation to value creation considers competitive relationships within the environment with the objective to dominate. Wisdom seeks out different insights with different interpretations, choices and consequences that are uncovered, but less concrete than a response founded on the basis of what is known.

A leadership system's thinking capacity patterned to Wisdom presents complex and inter-dependant thinking that tracks on-going variation to choices as the causal texture develops. It is not dependant of existing knowledge structures and patterns of interaction. Wisdom illustrates a capacity to detach from existing knowledge structures, with existing patterns of interaction, to consider and or adopt other. This pattern to thinking capacity drives learning logic of Transformation. Transformation implies consideration of different system capacity, and relies on leadership insights to consider a future different than a continuation of the past.

Leadership learning relies on a forward looking capacity in awareness to, and synthesis of understanding of past and present events and action with contextual

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variables and preferred future. Competitive Dominance forms the basis to meaning of a preferred future with this development system. In addition, the development system drives learning logic of Transformation. The leadership system thereby shows a capacity to be an overt casual actor to change knowledge structures, and patterns of interaction or activity. This combination of Competitive Dominance and Transformation presents transit character to a development system.

Learning focus drives Transformation as much as leadership traits, competence of behaviour to achieve efficiency to maturation, in organisational capabilities. The Transformation focus to leadership learning emphasise practices of creating meaning; collective capacities; the use of networks; cooperation and collaboration; and new and different ways making use of user-generated knowledge. The learning focus challenge dominant knowledge structures, patterns of interaction and activity, and presents an adaptive component to learning.

Organisational change provided thinking capacity patterned to Wisdom, the logic of Transformation, together with a value orientation of Competitive Dominance is likely to be stratified change. This implies change in knowledge structures at levels higher than the affected organisation capability, and brings about change to configurations or patterns of interaction towards different capabilities. Competitive Dominance remains the basis to meaning and drives current leadership routines and patterns of interaction.

Value orientation of Competitive Dominance, with associated elements of maturation to achieve complete and efficient capabilities, may inhibit change to already familiar routines and patterns. Change has the risk of, even though it involves change to knowledge structures at levels higher than the affected organisation capability, of being inhibited by path dependency and structural inertia (Dushkov, 2018; Schreyogg & Kliesch-Eberl, 2007). Watkins et al. (2017, p. 150) suggests change occurs, should complexity be treated in reductionist ways, in isolation to the system context and leaders “force comfortable, but inadequate, solutions.” The said risk to the leadership system’s capacity is not necessary with the polarity to knowledge structures, but the capacity and capability to respond in light of path dependencies and structural inertia. A complex interdependent thinking is required.

The dominant organisational philosophies within this development system are

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Competitive Dominance as orientation to value creation with a leadership system's thinking capacity patterned to Wisdom. Logic to learning is Transformation but elements of Maturation remain to achieve complete and efficient capabilities to dominate. The leadership system learning focus is a combination of Transformative and Maturation. It places emphasis on leadership traits and competence of behaviour to be skilful to achieve efficiency, in organisational capabilities. At the same time it focuses on practices of creating meaning; collective capacities; the use of networks; cooperation and collaboration; and new and different ways of making use of user-generated knowledge. The learning focus challenges dominant knowledge structures and patterns of interaction and activity, and presents an adaptive component to learning. Change has the risk, even though with knowledge structures at levels higher than the affected organisation capability, of being inhibited by path dependency and structural inertia.

### 5.2.3 Development System 3: Awaiting Shock

Conceptual Default Position 3 is characterised by; (a) an organisation disposition to value creation of Causal Interdependence in use value; and (b) leadership system's thinking capacity patterned to Skilfulness. The leadership system considers the organisation interconnected within a causal texture. Value creation is oriented to use value that relies on interrelated co-creation of products and services within the texture. The leadership system's thinking capacity orients to Skilfulness and thereby focuses on concrete responses formed on the basis of what is known and reliant on existing knowledge structures with existing patterns of interaction.

The thinking capacity patterned to Skilfulness drives a learning logic of Maturation. This implies inert increase of system capacity to a point of completeness or when it is considered to be established. The leadership system relies on core insights from experiences as bases to future predictions and relies on mastery of previous knowledge structures.

Leadership learning is to be dynamic between organisationally internally and externally contexts. It relies on a forward-looking capacity of awareness to or synthesis of past and present events and action with contextual variables with a preferred future. Causal Interdependence in use-value forms the basis to meaning of a preferred future,



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with leadership system's thinking capacity patterned to Skilfulness that drives logic of Maturation. This combination presents a strong frame to knowledge structure and patterns of interaction, whereas strategy orientation demands the complex capacity and capability of interconnectedness with the causal texture. I consider this development system, provided the afore-mentioned, as a system ignorant of its environment awaiting shock.

Learning takes place, even though the environment is considered a casual texture, as if the environment is technically rational. The environment is considered simple with little variables to change. The learning focus is with management and leadership traits, competence and behaviour to become more skilful in Maturation. The focus is to remain with its dominant knowledge structure with challenge for greater efficiencies.

Organisational change, considering the thinking capacity patterned to Skilfulness with logic of Maturation is predominantly distinct change. Change takes place with an organisational system capability. The possible change, should it not be Stratified Change, is tied to the knowledge structure that drives current leadership routines and patterns of interaction. The change is likely to reinforce the logic of maturation.

Change is not likely, provided the logic of Maturation, to first take place with leaders' knowledge structure at levels higher than the affected capability. The associated risk that complexity is treated in reductionist ways across tiers within the organisation and problem-solving is in isolation to system context. Change is thereby inhibited provided the path dependency and structural inertia. (Dushkov, 2018; Schreyogg & Kliesch-Eberl, 2007; Watkins et al., 2017)

Phelps et al. (2007) suggest a continuum of learning states ranging from a state of ignorance where the organisation is oblivious to the reality it faces; a state of awareness to one or more important issues; a state where new knowledge is aggressively looked for, or passively received; and finally action based on the new knowledge. This staged process relates to Rouse and Zietsma (2008) who suggests a trend that managers maintain with past models till a crisis brings about failure or radical change. This as existing capabilities becomes dominant logics that lead to filtering and prevent change. Rouse and Zietsma (2008, p. 13) suggest a change process in light of dominant logics, which entails: (a) a disconnect between

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environmental signals and dominant logic, with failure to form change strategies; (b) subsequent deliberate cross-boundary learning and restrategising; (c) more deliberate cross-boundary learning and restrategising informed by new stimuli; and (iv) institutionalisation of “routines for scanning, interpretation, organisation and strategising, enabling adaptive responses...”.

The dominant organisational philosophies within this quadrant are causal interdependent disposition to value creation; leadership system’s thinking capacity patterned to Skilfulness; learning logic of Maturation; with the leadership system learning focus is likely to be on leadership traits, competence of behaviour aimed at internally reinvention within existing structure and activity towards maturation within that structure.

### 5.2.4 Development System 4: Dynamic Canvass

Conceptual Default Position 4 is characterised by: (a) Organisation disposition to value creation of Causal Interdependence in use value; and (b) leadership system’s thinking capacity patterned to Wisdom. The disposition to value creation considers the organisation as interconnected with a causal texture. Its value creation orients to use value, which relies on the interrelated co-creation of products and services within the texture.

The leadership system’s thinking capacity is patterned to Wisdom and presents complex and inter-dependant thinking that tracks on-going variation to choices as the causal texture develops. It allows different insights with different interpretations, choices, and consequences being uncovered being less concrete than a response founded on the basis of what is known. The pattern is not dependant of existing knowledge structures and patterns of interaction, and it illustrates a capacity to detach from existing knowledge structures and patterns of interaction to consider and/or adopt another.

The thinking capacity patterned to Wisdom drives learning logic of Transformation. Transformation implies consideration to a different system capacity. The leadership system relies on leadership insights to consider a future different from a continuation of the past. The leadership system, thereby, becomes an overt and direct casual actor

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to change knowledge structures, and patterns of interaction or activity, and not limited to organisational boundaries.

Leadership learning provided the combination of value orientation and learning logic is focused on the context that forms leadership in the organisation. This implies an emphasis to practices of creating meaning; developing collective capacities and capabilities; making use of networks; achieving cooperation and collaboration; and learning new and different ways by making use of user-generated knowledge. It challenges dominant knowledge structures and patterns of interaction and activity. I refer to this combination of Causal Interdependence that form the basis to future meaning combined with logic of Transformation as Dynamic Canvass.

Organisational change, considering the thinking capacity patterned to Wisdom, the Transformation logic, with value orientation of Causal Interdependence drives Stratified Change. Change to knowledge structures occurs at levels higher than the affected organisational capability and bring about change to configurations or patterns of interaction towards different capabilities. It occurs at a wider scope than the primary affected capability.

Leadership's focus is with sharing knowledge as enabler to create new knowledge and innovation (Jakubik & Berazhny, 2017). Leadership drives the capability to identify, acquire and apply knowledge required (Phelps et al., 2007) in casual interference with the texture. An associated risk is not with the discovery of new knowledge structures, but with the system's capability to share and integrate knowledge to achieve action (Buchel & Sorell, 2012).

Leadership learning foci is to achieve culture and patterns of interaction that reflects a complexity required with Casual Interdependence. This implies organisational internal capacity, to all tiers and between tiers, to detach from a dominant knowledge structures and patterns of interaction, to identify, acquire, and apply knowledge within and between tiers, driven from a tier higher than the tier perceived to be most instrumental to change, at that time.

The dominant organisational philosophies within this quadrant is a causal interdependent disposition to value creation; leadership system's thinking capacity

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patterned to Wisdom; learning logic of Transformation; and a leadership system learning is focused on the context that forms leadership in the organisation, and associated transformation. This implies the capacity to all tiers of the organisation to detach from a dominant knowledge structures and patterns of interaction, but to maintain a strategic logic interrelation between tiers, with a dynamic interplay and emphases to patterns and logics of learning, within and in-between tiers.

### **5.3 AN OVERLAY OF THE THEORETICAL FRAME WITH THE STRATA FRAME**

My research aims, see section 1.3, suggest that I would differentiate between considerations in the design of a leadership development system, together with its effect on a system for the development of organisational leadership. I developed a “Strata Frame” from Stratified Systems Theory, described in section 1.6.5, to differentiate between considerations and logic to its effect on a system for the development of organisational leadership.

I describe my development of a Strata Frame and its application in the following sections. My intention with the use of the Strata Frame towards a theoretical framework is not to achieve a detailed complex explanation of the theoretical categories, but a dynamic complex understanding of interrelationships between conceptual categories. The application of the Strata Frame enables the assimilation of data-grounded central categories and properties into a theoretical frame.

I make use of the example strategic levers, with the application of the Strata Frame, highlighted with section 5.3.1 to integrate possible strategic logic to a theoretical frame. This provides a perspective of the development systems in relation to strategy complexity and associated capability required by a leadership system. This addition provides a dynamic logic to the Theoretical Framework as any one development system may be considered better aligned to organisational strategy drivers and associated capability required by a leadership system.

#### **5.3.1 Strata Frame as framework for the development of leadership architecture**

My research aims suggest that I would differentiate between considerations in the

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design of a leadership development system, together with its effect on a system for the development of organisational leadership. I developed a “Strata Frame” from Stratified Systems Theory to differentiate between considerations and logic to its effect on a system for the development of organisational leadership. My intention with the use of the Strata Frame towards a theoretical framework is not to achieve a detailed complex explanation of the theoretical categories, but a dynamic complex understanding of interrelationships between conceptual categories. I report on the application of the Strata Frame in Chapter 5, Emerging Theory, where I report on the assimilation of data-grounded central categories and properties into a theoretical frame.

Stratified Systems Theory (Jaques, 1985) presents a hierarchy of strata in management (see section 1.6.5 from Chapter 1). Strata are differentiated in terms of the complexity levels related to organisational work with each level representing a unique theme (Jaques, 1985; Kinston & Rowbottom, 1989; McMorland, 2005; Grobler, 2005). Moreover, differentiation is achieved by a timespan of work responsibility, where time indicates the maximum time spent in completing particular tasks (Jaques, 1985). At the heart of the theory is the notion of work, with the different time frames ranging from individual to extra-organisational work offering “exercise discretion” between strata (Jaques, 1985, p. 234; Jaques & Stamp, 1990, p. A-6). Given the strata differentiation accompanied by a unique theme for each stratum (Jaques, 1985; Kinston & Rowbottom, 1989; McMorland, 2005; Grobler, 2005), the Stratified Systems Theory provides a frame by means of which management tasks can be approached.

My starting point in considering stratum themes was to integrate Stratified Systems Theory with the typology that Jaques (1985) provided. More particularly, as set out in Table 5.4, I used Both Jaques and Stamp’s (1990), and Jaques and Clement ‘s (in McMorland, 2005) strata descriptions.

Jaques (1985, p. 235) provides his Stratified Systems Theory with strata ranging from I to VII. Stratum I, with the cognitive state of “hands on direct work with things and people in task execution...shaping things”. Stratum II, and the cognitive state that “defines direct work...planning and controlling of tasks”. Stratum III, with the cognitive state extrapolates functional system trends and balances regarding current and future

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requirements. Stratum IV, with the cognitive state transforms operating systems and shifts from direct command. Stratum V has the cognitive state shaping complex systems. Stratum VI, with a cognitive state oversees complex systems and defines their relations with the environment, and, finally, Stratum VII, with a cognitive state creates complex systems and organises major resources based on the extrapolation of system needs.

System activity varies from direct work, controlling aggregate work, systemic practices, the integration of work systems, the direction to complex work systems, to the definition and creation of complex work systems. These system activities represent different levels of complexity in the exercise of discretion.

**Table 5.4: Stratified Systems Theory stratum and descriptions**

SCHOLARS				
Jaques (1985, pp. 234-235)		Jaques and Stamp (1990, p. A-7))		Jaques and Clement (in McMorland 2005, p. 79)
Stratum	Cognitive State as Stratum Theme	Level of work description	Capability to the exercise of discretion	Intention/objective
VIII			Transforming: macro context and create different social institutions.	
VII	Creates complex systems and organises major resources based on extrapolation of system needs	Strategic design, development, deployment of complex systems	Extrapolation: from contexts at Stratum VI and creating connections which can sustain the formation and development of Stratum V institutions initiated at Stratum VIII.	New forms of social, political and economic institutions
VI	Oversees complex systems and defines their relations with the environment	Direct deployment of complex systems	Defining: generate a range of perceptions of complex Stratum V systems and shape social, political and economic contexts in which they operate. Construct the future rather than forecast it.	Vision, building strong national and worldwide presence
V	Shapes complex systems	Complex systems, encompassing operating systems and modifying	Shaping: indicate relationships between previously unrelated materials; create general rules and redefine fields of knowledge and experience. Engage with an open context and decide when it	Direction, purposeful, challenge and maximising assets



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SCHOLARS				
Jaques (1985, pp. 234-235)		Jaques and Stamp (1990, p. A-7))		Jaques and Clement (in McMorland 2005, p. 79)
Stratum	Cognitive State as Stratum Theme	Level of work description	Capability to the exercise of discretion	Intention/objective
		context	should be closed; operate a complex five stratum system, modify its boundaries and cope with arising second and third order consequences. Elements explicitly seen as inter-dependant; to change one part is to change the whole.	
IV	Transforms operating systems and shifts from direct command	Alternative operating systems – general management	Transforming: retain contact with what currently exists and detach to conceptualise something completely different - not a modification but a point of departure. Contrast and compare alternative operating system and alternative modes of deploying or modifying them. Maintain a patterned structure within which hypothesis is tested.	Innovation, change and continuity
III	Extrapolates functional system trends and balances current and future requirements	Direct operating systems – management of a mutual recognition unit	Extrapolating: extrapolates from given rules and handle ambiguity by creating new connections within a defined system. Mould operating tasks and operating methods into a system of direct work and fine tune that system to cope with changing trends.	Effective work practices, systems and productivity
II	Defines direct work, which implies planning and controlling aggregates of tasks	Direct operating methods – supervision of a mutual knowledge system	Defining: generates different perceptions of a given situation; organise perceptions in alternative ways; handle ambiguity by polarising, Put together a programme of direct operating tasks in order to accumulate knowledge about their aggregation and to change programmes in the light of the given situation	Effective coordination, collective improvement and efficiency
I	Hands on direct work with things and people in task execution	Direct operating tasks	Shaping: See the world through a few focussed dimensions and engage directly with physical objects or serve people one task at a time	Excellence of task



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Van Clieaf and Langford Kelly (2005a, 2005b, 2007), use the Stratified Systems Theory to illustrate that organisations function at different levels of strategy complexity. They (Van Clieaf & Langford Kelly, 2007) define five levels of accountability for Chief Executive Officers with associated levels of innovation and risk relative to the stratum from stratified systems theory. These are: process innovator; new market, service market innovator, new business model innovator, global industry/structure innovator, and global business/societal innovator.

The levels correspond with the Chief Executive Officer's accountability in that conceptual and planning skills relating to the strata are derived from the stratified systems theory. The relationships commence with the strategy complexity of process innovator linked to Stratum III of the theory. The next level of strategy complexity, New Product/Service/Market Innovator, relates to Stratum IV of the theory. Finally, global business/societal innovator is linked with Stratum VII of the theory. According to Van Clieaf and Langford Kelly (2007) this complexity is defined in terms of principles of complexity and not by actual size of the organisation.

I form a Strata Frame with representing a combination of the levels of strategy complexity that Van Clieaf and Langford Kelly (2007) provide and its interrelation with Stratified Systems Theory with the stratum descriptors from Stratified Systems Theory (Jaques, 1985; Jaques & Stamp, 1990; Jaques & Clement in McMorland, 2005). This is portrayed in Figure 5.3.

The following sub-section illustrates an adjustment made to the Strata Frame to accommodate different strategy drivers. The sub-sections thereafter illustrate the overlay of the four development systems with the Strata Frame; explains the significance of the theoretical frame; and highlights variations to leadership development systems and strategic complexity.

### **5.3.2 Adjustment to the Strata Frame**

I am to integrate the consideration of business strategy to the frame of four development systems with an overlay of the Strata Frame. The Strata Frame is a representation of levels of strategy complexity that Van Clieaf and Langford Kelly (2007) provide, with interrelation to Stratified Systems Theory stratum descriptors

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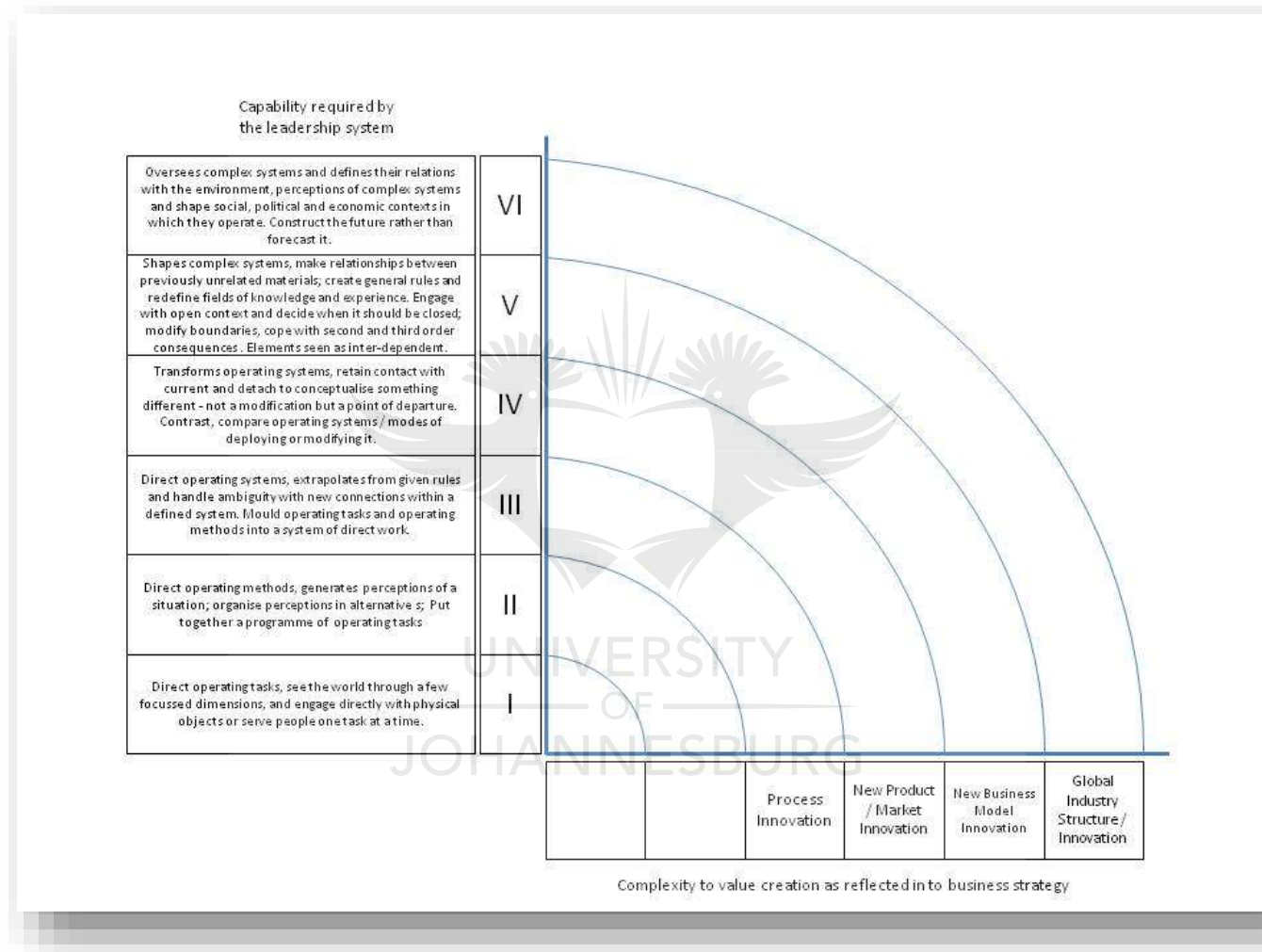
(Jaques, 1985; Jaques & Stamp, 1990; Jaques & Clement in McMorland, 2005). Van Clieaf and Langford Kelly (2005a, 2005b, 2007) argue that organisations function at different levels of strategy complexity and relate that to Stratified Systems Theory to illustrate the associated leadership capacity for role accountability of Chief Executive Officers.

Van Clieaf and Langford Kelly provide a continuum of strategic complexity. However, I made use of examples of different strategic postures and strategy levers with the discussion of research findings and refinement of categories. I therefore do not discard those examples and illustrate in Table 5.5, how I compare the examples I used with levels of strategy complexity provided by Van Clieaf and Langford Kelly (2007).

**Table 5.5: Comparative picture of strategy complexity**

Strategy complexity provided by Van Clieaf & Langford Kelly (2007, pp. 106-112)	Examples of strategy levers, as deducted from Ungerer et al., (2016), Sanchez (2012), Selsky et al., (2007), and Hazy (2006)	Examples of strategic posture (Ungerer et al., 2016; Selsky et al., 2007)
Process innovator	Optimise current opportunities with incremental improvements to efficiency of the system	Fit or adapt to the environment
New market, service market innovator	Pursue new opportunities making use of existing capabilities	Continually seeks internal reinvention
	Pursue new opportunities by new capabilities based on existing resources	
New business model innovator	Pursue opportunities by new capabilities based on new resources	
	Pursue opportunities by new capabilities based on new interfaces within and in-between organisations	
Global industry / structure innovator		Collaborative exploits beyond the aim to denominate a market.
Global business / societal innovator		

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**Figure 5.3: Focal categories Making Sense, and Purposing and Cowardice in graphic relation to each other**

(Derived from Jaques, 1985, pp. 234-235; Jaques & Stamp, 1990, p. A-7; Jaques & Clement in McMorland, 2005, p. 79; Van Clieaf & Langford Kelly, 2007, pp 106-112 )

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My interest is not to achieve a detail valid comparison, but a comparative picture that illustrates progression of complexity. I modify the Strata Frame to reflect this incremental progression in complexity. I thereafter use the adjusted Strata Frame, as illustrated with Figure 5.4, to integrate the property of business strategy to a Theoretical Frame.

### 5.3.3 Overlay of the four development systems to the Strata Frame

I integrate the consideration of business strategy to the frame of four development systems with an overlay of the Strata Frame. This overlay is illustrated with Figure 5.4. The frame formed by the interrelation between the focal categories Making Sense, and Purposing and Cowardice, as illustrated with Figure 5.4, is positioned onto the Strata Frame. The placement of the Frame onto the Strata Frame positions the four default development systems into a relation to complexity of business strategy, and the associated capability required by the leadership system.

The conceptual default development systems, each with different character, now have an interrelation with complexity of business strategy, and the associated capability required by the leadership system. This interrelation between the four conceptual default development systems, complexity of business strategy, and the associated capability required by the leadership system presents the Theoretical Frame.

The Theoretical Frame allows consideration of an organisation's present business strategy together with the required capability by the leadership system. The character of the present development system can be compared with and located within one of the four conceptual default development systems. The Theoretical Frame allows consideration of the character of the development system present within the organisation.

I believe it prudent to explain the positioning of the Frame onto the Strata Frame to produce the Theoretical Framework before I describe the application of the Theoretical Frame. The Frame's vertical axis divides the Strata Frame axis of complexity to business strategy. This divide is made between business strategies New Product/Market Innovation and New Business Model Innovation. The rationale to that distinction is the view that strategy drivers Process Innovation and New

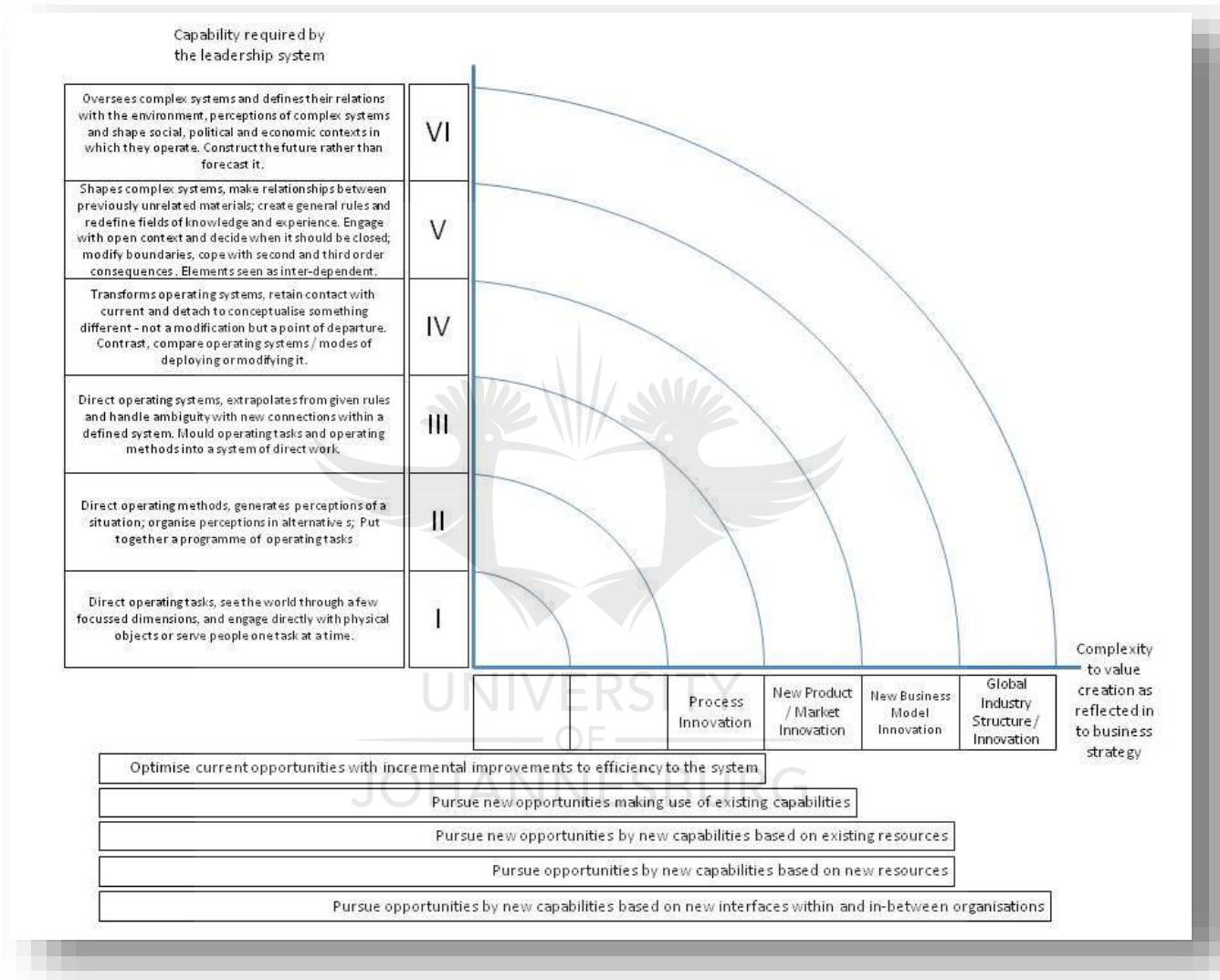
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Product/Market Innovation remains with a domain of existing capabilities and resources, as illustrated with Table 5.5 and Figure 5.5. Process Innovation considers efficiencies with current capabilities. New Product/Market Innovation consider new products or markets making use of existing resources and capabilities and I therefore do not consider those strategies to depart significantly from a thinking capacity of Skilfulness, a learning logic of Maturation, and a strategy posture of competitive dominance.

I base this view on an assumption that strategy drivers Process Innovation and New Product/Market Innovation by existing resources and capabilities come about within a value orientation of competitive dominance and do not shift that orientation. A further assumption is that the adoption of new business models may introduce a different value orientation, oriented towards causal interdependence.

The Frame's horizontal axis divides the Strata Frame axis of capability required by the leadership system. The division is made between Strata III and IV. Stratum III requires the leadership capacity to direct operating systems by using given rules and handling ambiguity with new connections within a defined system. This resembles Skilfulness, which I consider to be characterised by concrete responses formed on the basis of what is known, and dependant of existing knowledge structures with existing patterns of interaction. Stratum IV requires a leadership capacity that transforms operating systems together with the capacity to detach from the current and to conceptualise something different, which relates to the thinking pattern of Wisdom.

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**Figure 5.4: Adjusted Strata Frame**

(Derived from Jaques, 1985, pp. 234-235; Jaques & Stamp, 1990, p. A-7; Jaques & Clement in McMorland, 2005, p. 79; Van Clieaf & Langford Kelly, 2007, pp 106-112 )



#### **5.3.4 Significance to Theoretical Frame of Four Development Systems**

This section introduces a limited description to the application of the Theoretical Frame. This section concludes the description of the Theoretical Frame with illustration of variations to leadership development systems and strategic complexity.

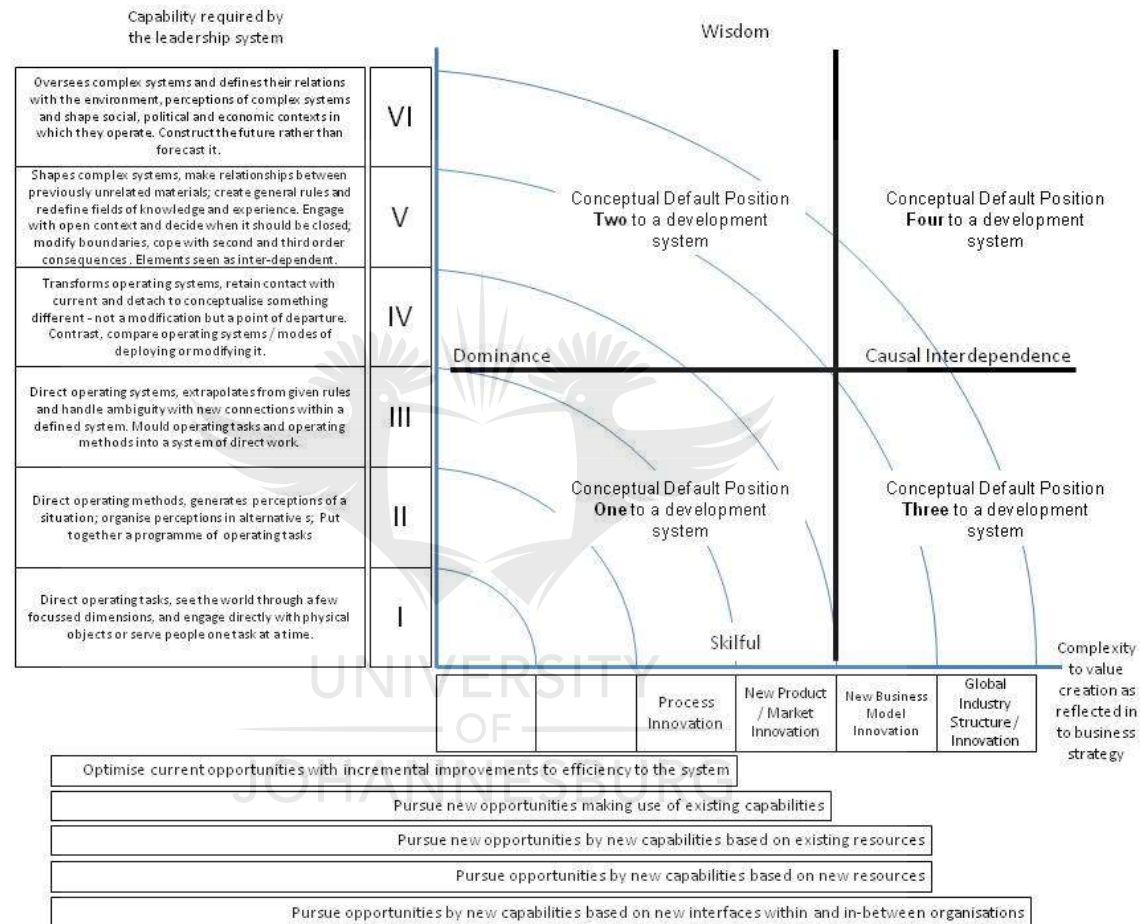
The application of the Theoretical Frame is based on the premises that (a) organisational strategic complexity requires a level of complexity from a leadership system. Furthermore, that (b) the leadership development system, in turn, need to support or align to that required level of complexity required of the leadership system.

The above premises is grounded on the view from Wright and McMahan (1993) that organisational strategic intent is a key determinant to HRM practices and that theories ignore business strategy as a determinant of HRM practices. In addition, Weiss and Molinaro (2005) argue that leadership development strategy should interlink practices with each other and with organisational strategy. Leskiw and Singh (2007) explain needs assessment as the setting of objectives to ensure that the development system link to the overall organizational strategy; and secondly, to single out effective behavior and the identification of gaps compared with the ideal.

McGuire et al. (2009, p. 6) highlight, provided the interlink between organisational strategy and leadership development, that as organisational strategies become more complex, the organisational culture need to reflect, or grow, to reflect similar complexity. Watkins et al. (2017) argue that complexity is treated, many a time, in reductionist ways in isolation to system context or environment and suggest leaders move away from the view of linearity of environments, but should adopt a view of complexity. Porter (1985) emphasises that different strategies require different skills and cultures. In addition, Lissak et al. (2009) argue that HR strategies should support organisational strategy and that HR strategies should ensure a correct supply of skills competences and experience.



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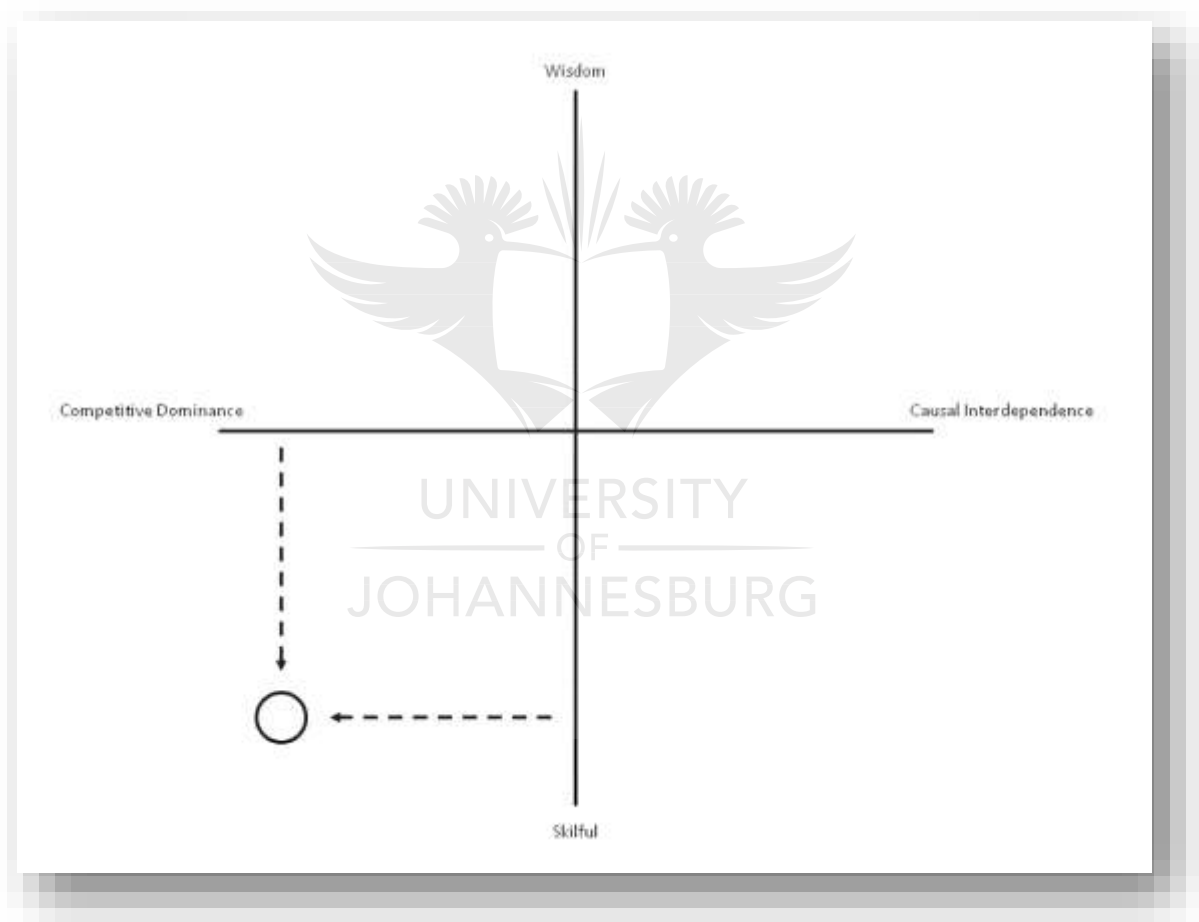


**Figure 5.5: Overlay of the four development systems to the Strata Frame**

(Derived from Jaques, 1985, pp. 234-235; Jaques & Stamp, 1990, p. A-7; Jaques & Clement in McMorland, 2005, p. 79; Van Clieaf & Langford Kelly, 2007, pp 106-112 )

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A first application of the Theoretical Frame is with a comparative view of the complexity to a leadership system to the character of the existing leadership development system. The existing complexity is illustrated making use of the graphic relation between the predominant patterns to thinking capacity together with the orientation to value creation, as illustrated with Figure 5.6. The leadership system complexity can be located within any of the four quadrants. The example, illustrated with Figure 5.7, reflects a leadership complexity where the predominant orientation to value creation is competitive dominance. At the same time, the leadership system's learning capacity is patterned to Skilfulness.

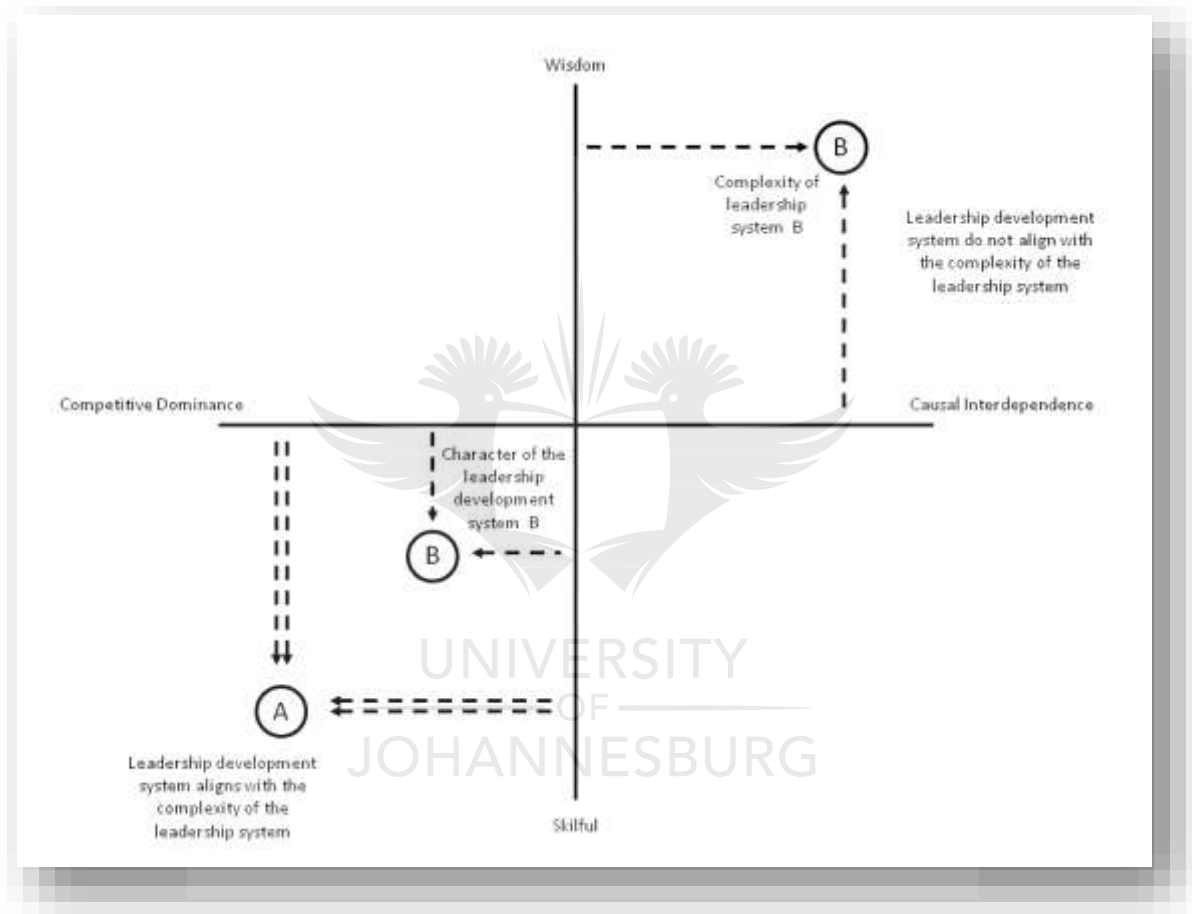


**Figure 5.6: Illustration of complexity to a leadership system**

A further application is to position the character of the existing leadership development system to one of the four quadrants reflected with Figure 5.7. The four conceptual default development systems are described with sections 5.2.1 to 5.2.4.

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A comparison between the complexities to a leadership system, as illustrated with Figure 5.7 with the character of the existing leadership development system may suggest (a) that the existing leadership development system align with the complexity of the leadership system it drives, as illustrated with A in Figure 5.7; or (b) that the existing leadership development system does not align with the complexity of the leadership system it is meant to drive, as illustrated with B in Figure 5.7.



**Figure 5.7: Illustration of comparison of the complexity to a leadership system with the character of existing leadership development system meant to drive the leadership system**

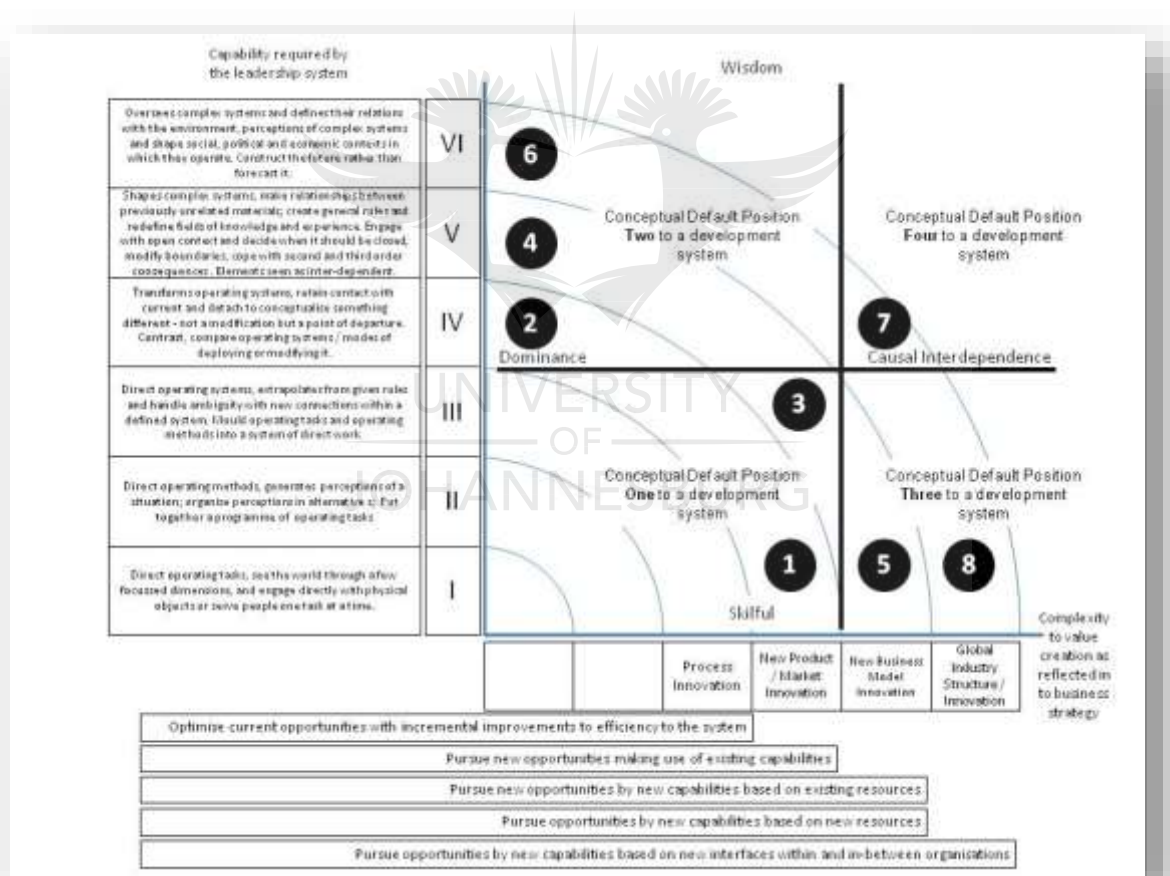
The comparative view of the complexity to a leadership system together with the character of the existing leadership development system is refined with the use of the full strategic framework. The Frame overlaid with the Strata Frame provides example strategy drivers with associated capability required by the leadership system to allow a better location of the complexity to a leadership system as illustrated with Figure 5.8.

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It is, however, noticeable, with the use of the Strategic Framework that variation is present to the complexity of the leadership system and the character of related development system. This is a dynamic to strategic framework explained in the following section.

### 5.3.5 Variation to the complexity of the leadership system and the character of related development system

Variation exists to the location of leadership system complexity and its relation with the character of a development system. The variations are marked one to eight with Figure 5.8. These are explained as they qualify development systems relation to the required complexity to the leadership system.



**Figure 5.8: Variation to the location of leadership system complexity and its relation with the character of a development system**

Variation is noticeable, as marked one to eight with Figure 5.8, that: (a) New

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Product/Market Innovation its relation to with Stratum IV is located within Conceptual Default Position One (marked one in Figure 5.8), but may find it located within Conceptual Default Position 2 (marked 2 in Figure 5.8); (b) New Business Model Innovation with required leadership system capacity associated with Stratum V may have a footprint with Conceptual Default Positions 1 (marked 3 in Figure 5.8), 2 (marked 4 in Figure 5.8), or 3 (marked 5 in Figure 5.8); and that (c) Global Industry Structure Innovation with the requirement to leadership system capacity at Stratum VI potentially located with Conceptual Default Positions 2, 3 or 4.

The variations are possible as the Conceptual Default Positions to development systems reflect leadership development system character. This character may, or may not align with the complexity to the leadership system in light of the business strategy and associated requirement in leadership system capacity. Misalignment may result with, as described in Table 5.6 in (a) a development system that does not supports or drives the leadership capacity required in light of the business strategy, which makes the development system misaligned; (b) a development system that supports and drives the leadership capacity required by business strategy, which makes the development system aligned; and (c) a development system that supports a leadership complexity greater than what is required at the time by the business strategy, which makes the development system differently aligned.

**Table 5.6: Variation between the requirement to leadership system complexity and the character of a development system**

Location	Description	Status
New Product / Market Innovation with Strata IV is located within Conceptual Default Position One	<p>Process Innovation and New Product / Market Innovation by existing resources and capabilities come about within a value orientation of competitive dominance that does not change with the innovation or new products or markets.</p> <p>The development system drives a value orientation of competitive dominance and a leadership system capacity to direct operating systems.</p>	Aligned
New Product / Market Innovation with Strata IV is located within Conceptual Default Position Two	<p>Process Innovation and New Product / Market Innovation by existing resources and capabilities come about within a value orientation of competitive dominance that does not change with the innovation or new products or markets.</p> <p>The development system, at the same time, drives a capacity to detach from existing knowledge structures with existing patterns of</p>	Differently aligned

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Location	Description	Status
	interaction to consider and or adopt other. The development system is shaped on an orientation to value based on competitive dominance.	
New Business Model Innovation with required leadership system capacity associated with Strata V is located within Conceptual Default Position One	<p>New Business Model Innovation with required leadership system capacity to bring about complex systems.</p> <p>The development system drives a value orientation of competitive dominance and a leadership system capacity to direct operating systems.</p> <p>The new business model may remain with an orientation to value creation of Dominance, in which case the development system appear to be aligned but it is not provided the leadership capacity it should drive. The development system is misaligned. The development system would be more misaligned should the value orientation have shifted towards causal interdependence.</p>	Misaligned
New Business Model Innovation with required leadership system capacity associated with Strata V is located within Conceptual Default Position Two	<p>New Business Model Innovation with required leadership system capacity to bring about complex systems.</p> <p>The development system drives capacity to detach from existing knowledge structures with existing patterns of interaction to consider and or adopt other. The development system is shaped on an orientation to value based on competitive dominance.</p> <p>This value orientation may inhibit change to already familiar routines and patterns responding to new environmental demands. Change has the risk of being inhibited because of path dependency.</p> <p>The new business model may remain with a value orientation of Dominance, in which case the development system remains differently aligned as it drives a capacity that bring about complex systems within value orientations of dominance.</p>	Differently aligned
New Business Model Innovation with required leadership system capacity associated with Strata V is located within Conceptual Default Position Three	<p>New Business Model Innovation with required leadership system capacity to bring about complex systems.</p> <p>The development system drives a value orientation of causal interdependence, but the development system is misaligned as it drives a leadership system capacity to direct operating systems.</p>	Misaligned
Global Industry Structure Innovation with the requirement to leadership system capacity at Strata VI is located with Conceptual Default Position Two	<p>Global Industry Structure Innovation with the requirement to leadership system capacity to oversee and define interrelations between complex systems.</p> <p>The development system drives a capacity to detach from existing knowledge structures with existing patterns of interaction to consider and or adopt other. The development system is grounded with an orientation to value of competitive relationships with the objective to dominate. This value orientation may inhibit change to already familiar routines and patterns responding to new environmental demands. Change has the risk of being inhibited because of path dependency.</p>	
Global Industry Structure Innovation with the requirement to leadership system capacity at Strata VI is located with Conceptual Default Position Three	<p>Global Industry Structure Innovation with the requirement to leadership system capacity to oversee and define interrelations between complex systems.</p> <p>The development system drives a value orientation of causal interdependence, but the development system is misaligned as it</p>	Misaligned



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Location	Description	Status
	drives a leadership system capacity to direct operating systems.	

### 5.4 SUMMARY

I have set out, with this chapter to assimilate central categories into a theoretical framework to development system design. In addition, I have considered variants to the system design that illustrate variations to a systems alignment with organisational strategic context. I considered, I doing so, the categories Making Sense; Purposing and Cowardice; and Dual Cores as central categories based on the analysis described in Chapter 4.

The central categories and its conceptual meaning, with their properties summarised in section 4.6, form the basis to considerations to the design of a leadership development system. Contrasting elements that surfaced from the categories, as described in section 4.5, present elements of variability to properties and thereby present choices that affect the design of a system for the development of organisational leadership.

The central categories, namely, Making Sense, and Purposing and Cowardice with the associated contrasts, and conceptual meaning create a structure or a basis to a theoretical frame. These categories, placed in graphic relation to each other, as illustrated with Figure 5.2 form a component to an emerging theoretical framework. Purposing and Cowardice, with patterns to leadership system's thinking capacity form a vertical axis. Making Sense, in contrast with orientation in value creation forms a horizontal axis.

Placing the central categories in relation to each other presents four quadrants that form conceptual defaults to development systems. Each quadrant presents a different character to a leadership development system in its drive in leadership development. These four conceptual defaults to development systems are described with sections 5.2.1 to 5.2.4 and form part of the basis to the theoretical frame. These defaults to



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development systems present, by themselves and by their characteristics, different considerations to the development of leadership development systems.

The frames of four default development systems were placed into a relation to complexity of business strategy, and the associated capability required by the leadership system. This brought an interrelation between the conceptual default development systems' characters with complexity of business strategy, and the associated capability required by the leadership system and formed four different logics to the design of systems for the development of organisational leadership. This interrelation between the four conceptual default development systems, complexity of business strategy, and the associated capability required by the leadership system presents the Theoretical Frame.

The Theoretical Frame allows consideration of an organisation's present business strategy together with the required capability by the leadership system. Similarly, the character of the present development system can be compared with and located within one of the four conceptual default development systems in relation with the required capability by the leadership system. This allows consideration of the character of the development system present within the organisation.

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## CHAPTER 6

### MY RESEARCH STORY

#### 6.1 INTRODUCTION

*Like any journey, doing qualitative research is an adventure, with all its accompanying excitement, stimulation and as well as the challenges to confront. Even with an itinerary and a rough plan for the way in which you expect things will unfold, there are always surprises, twists and turns in the road, and unforeseen obstacles that must be negotiated. In spite of all the preparation you might do in the form of reviewing literature, studying maps of the terrain, talking to others who have travelled the road before you, the one thing that you can count on for certain is that you will not end up where you expected you would. That is why qualitative research requires a degree of flexibility and fluidity while venturing into new territory, skills that mark you as an explorer...(Minichiello & Kottler, 2010, page 2 of 15).*

Schurink (2015) believes that being involved in supervising many doctoral and Master's students, it is critical that research stories should be included in qualitative dissertations and theses. These stories include one's reflection on important events, persons and important experiences in your personal and working life that influenced you as researcher. Such information assists both the reader and researcher in understanding how the researcher implemented his or her ontological and epistemological positions in the practical execution of the study.

A particular important function of the research story is the opportunity it provides researchers to assess the quality of their work by offering what is known as an audit trail (Plummer, 2001; Bailey, 2007, p.6; Bloomberg & Volpe, 2008; Schurink, 2009). Schwandt (2007, p. 12) points out that the audit trail serves "...to render judgement about the dependability of procedures employed by the enquirer and the extent to which the conclusions of the study are confirmable." Rodgers (2008, p. 44) adds that the audit trail offers "... a mechanism for retroactive assessment of the conduct of the

inquiry and a means to address issues related to the rigor of the research as well as the trustworthiness of the results.”

Another key function of the research story is its facilitation of reflexivity. Writing about reflective journals, which forms a major source for compiling research stories, Janesick (2004, p. 144) points out that these journals attend to the researcher’s self which is critical in qualitative because of him or her being the research instrument. “Journal writing personalizes representation in a way that forces the researcher to confront issues of how a story from a person’s life becomes a public text, which in turn tells a story” (2004, p. 144). For Albertini (2012, pp. 61–62) research stories “...serve to illustrate the ability of researchers to reflect, that is, to think critically about the way in which their status, characteristics, values and background, as well as the numerous and varied decisions which they would have made while executing the research, impacted on their studies” (Albertini, 2012, pp. 61–62).

I offer, in this chapter a personal account of my research. However, before I present my self-narrative two cautionary words are in order: (a) Since it is impossible to cover all events that expired during my five-year long doctoral journey, I include only those events, persons and decisions that I regard as most significant, and (b) since as qualitative researcher I am the research instrument, I offer a sketch of myself, as background. With regard to the second point, Minichiello and Kottler (2010, p. 7 of 9) write:

***You can’t understand qualitative research without understanding your personality—that is, your own motives, interests, values, and goals. What are you searching for and what is that journey really about? It is not just about advancing knowledge and science, but also about pursuing a personal agenda. This is not only legitimate to acknowledge but important to the process (page 7 of 9) (emphasis added).***

## **6.2 SKETCHING JURIE HANEKOM**

I hold a BA, BA Hons, and a MA Degree in Public and Development Management obtained at the Stellenbosch University. I am married to Martie, and we have a son,

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and a daughter, respectively sixteen and thirteen years old. Both were interested in the research; our daughter was specifically interested in my reason for studying: “So why do you study?” she would ask. Whereas our son’s interest was the method of research.

I started my career as an officer in the South African Navy where I held various appointments relating to management and leadership development. Subsequently, I held positions in other spheres of public service where my respective responsibilities ranged from management and leadership development, to organisational learning and development. During the course of the studies, my responsibility was to develop management and leadership capacity across various public institutions with a “head count” in the proximity of 160 000. Overall I have had 24 years’ experience in human resource development, including management and leadership development.

I move on, having offered a brief portrait of myself, to share noteworthy experiences and activities that occurred during the research journey. More specifically, I discuss (a) my interest in the area of study; (b) my decision to pursue my PhD at the Department of Industrial Psychology and People Management (IPPM) at the University of Johannesburg (UJ); (c) clarifying the research topic and stratified systems theory as conceptual framework; (d) my concerns with the literature; (e) the decision to focus on individuals as research participants instead of organisations; (f) my learning during interaction with the participants; (g) data analysis; (h) constructing the thesis; (i) my apprenticeship and my supervisors; (j) other challenges I experienced during the journey; (k) examination, and (l) final reflections.

### **6.3 MY INTEREST IN THE AREA OF STUDY**

My interest in the research topic stems from the work I do. I interact, as a manager responsible for management and leadership development, with stakeholders that present a variety of viewpoints, approaches to, and practices in management and leadership development. In my view these can be divided into two groups. Firstly, there is the stakeholder or owner in development that forms the driving impetus for future development. These stakeholders have the insight to context and knowledge to anticipated change. Secondly, there is the stakeholder together with potential partners or vendors in the development who have a myriad of viewpoints, approaches and

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practices. This context of variable viewpoints, I believe, needs to be distilled to a core so that development systems can be designed and constructed with a logic that offers to integrate many of those viewpoints. A strategic development architecture is required.

I have found that clients, in many cases, have strong views as to what they wish to see different in their organisation's management and leadership system. This is a starting point. However, responses towards that ideal may in many cases not be as simple as an immediate "fix" by, for example, a short training programme. It is for this reason that I believe in the utility of strategic development architecture, a logic built on fundamental considerations to a development system, shared between manager and client.

Strategic development architecture enables a line of sight between the current future in the organisation's context; its strategy, and operational requirements and the character of the organisational system that develop managers and leaders. With its fundamental considerations, this architecture assists in creating dialogue that bridges the current and future within the organisation's leadership, strategy, and operational contexts. Furthermore, the strategic development architecture provides a heuristic frame for developing a development strategy with associated practices, and their integration with one another and strategy.

I believe, similar to the laws of physics like for example Newton's laws of motion (see Pople, 2014), that fundamentals are required in the field of leadership development. More particularly, with the abundance of theory and practices, deep-seated frameworks are required. Deep-seated frameworks with fundamental considerations that transcends the myriad of development theories, styles, practices, and sales pitches of unique value offerings.

Informed by architecture the idea of a bridge comes to mind that can guide the dialogue in terms of the developmental system of the organisation's leadership context, its strategy, and management's operational requirements.

## **6.4 ENROLLING FOR DOCTORAL STUDY**

“Often the things we choose to study are of great interest to us because of our own background and experiences” (Kottler & Minichiello, 2010, p. 3 of 15).

During 2013, I had conversations with Doctor Rica Viljoen about leadership development systems and their design. I knew her from working on projects in leadership development ranging from design, development and facilitating short learning experiences.

Doctor Viljoen and I talked about the integration of leader development strategy, organisational strategy, and multiple development practices. At the time I believed, and I still do, that much development work can fit into categories of self-serving development, development of benefit to organisational strategy but not aligned or development congruent with organisational strategy. Doctor Viljoen encouraged me to pursue the idea of architecture in leadership development and perhaps to consider using it as topic for a PhD degree. The seed she planted grew with time. I enrolled at the Department of Industrial Psychology and People Management (IPPM) at The University of Johannesburg (UJ) with whom Doctor Viljoen was affiliated. I enrolled with the motive of exploring the body of knowledge in leadership development and making a contribution to it.

Looking back it is interesting, but certainly not unusual, that I selected a study leader first, and thereafter a local university. I was delighted when my application was accepted.

## **6.5 FOCUSING THE RESEARCH TOPIC BY INCORPORATING STRATIFIED SYSTEMS THEORY AS GUIDING FRAMEWORK**

I have learnt that research topics change. My original thoughts about a topic to the study were: “Strategic Architecture to the development of organisational leadership capacity.” I believed, as I do now, that a fundamental set of considerations could be uncovered to guide decisions to the design of a developmental system.

The notion of organisational leadership capacity represents an outcome from the

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leadership development system. Given the multiplicity of views to leadership and its development my thinking was that the idea of organisational leadership capacity makes an organisational level interest to leadership development explicit. I believe that this point of departure to organisational leadership capacity a macro-interest, and allows different choices to a development system. My interest in that topic was to uncover fundamental considerations to the design of a leadership development system, linked to different measures of that capacity.

I was directed by IPPM to change the study's title to: Applying a Stratified Systems Theory Framework for creating an Organisational Leadership Development Architecture. The rational, I understood, was that (a) the notion of Strategic Architecture to organisational leadership capacity did not exist, and (b) Stratified Systems Theory would provide a known conceptual framework that grounded the study. I felt that I was being pushed into a box of known and comfortable ideas, but felt I had to find a bridge. I always knew that Stratified Systems Theory would form a part of the study, but would not be a concept for framing the study.

I was hesitant to make use thereof in the topic of the study as it might have created expectation that development architecture being pursued is located and confined to the development of leaders to a specific stratum, or development of leaders between strata. I believed that expectation would reduce my research to a narrow application of development strategy, policy and practice to a stratum or strata. My wish was to consider development architecture at a macro and more abstract level than the typical view of development strategy, policy and practice to human resource architecture. It was meant to consider fundamental considerations that had an effect on the entire development system, regardless of strata.

I considered the application of Stratified Systems Theory as framework for creating a hierarchy to the considerations to leadership development identified with the study. Thus, for example, I could potentially single out fundamental considerations that the human resource development function ought to keep in mind with leadership development, and then make use of Stratified Systems Theory to locate those considerations as strategic, tactical, and operational with associated characteristics.

A further possibility with the application of Stratified Systems Theory was to use it as



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framework that illustrated variability to leadership system complexity associated with organisational strategy. I believed at that time, and still do, that an ability to classify complexity to organisational strategies together with leadership capacity associated thereto allows emphases to specific aspects to a the development system. Alternatively, the leadership development system should take the organisational strategic complexity into consideration according to its design and emphasis.

With this study, I opted to make use of Stratified Systems Theory as a framework that illustrates variability in leadership system complexity associated with organisational strategy. It should be noted that even though this choice, I ended up including a use of Stratified Systems Theory for creating a hierarchy to the considerations to leadership development identified.

### **6.6 GRAPPLING WITH CONSULTING LITERATURE**

I outlined my views in terms of the role and place of the literature in Chapter 2. However, thinking back I grappled with it. Firstly, in developing the research proposal, I had to undertake a literature review of some sort in order to demonstrate a gap in existing knowledge. At the same time employing grounded theory as a research strategy cautioned me to expose myself to the literature before fieldwork. I proceeded and compiled the research proposal including key concepts derived from literature.

The use of literature, in the draft of the research proposal was frustrating for me. I had to provide pointers to theoretical concepts but I was cautioned not to delve too deeply into the literature so as to maintain an “open mind” prior to data collection. As I understood grounded theory key concepts could only be identified when conceptual categories emerged from data. However, as I became better acquainted with the various grounded theory approaches and in particular its constructivist family, I changed my initial view concerning the use of literature at the proposal stage by adopting an iterative position. In retrospect the initial literature review enabled me to demarcate an appropriate research problem, and to formulate a worthy research purpose and to “sell” my proposed study to a university research proposal committee. Also, concepts originally thought to be important were replaced as the study progressed.

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However, a related issue was the repeated question whether the literature I used was sufficient? Did it provide enough depth? Were the works I used topical? For example, having a theme that has leadership sense-making, is the task at hand to relate it to concepts contained in extant literature, or, to the contrary, to go deep into the theory of sense-making. I concluded that, when striving to uncover considerations that are relevant to leadership systems design and its logic, detail complex explanations are less relevant than forming relationships with elements in themes or between themes. Detailed complex explanations would compel an exhaustive review of a concept in the literature, risking displacing the research purpose to construct a series of considerations and logic for the development of the organisational leadership system.

### **6.7 THE RESEARCH PARTICIPANTS: KEY IMPRESSIONS**

I have given considerable thought to the refinement of the actual subject and object of this research. At first I considered making organisations the object of the study. Thus, to consider what particular organisations believed to be considerations to the design of a leadership development system. This may have implied making use of organisations to form case studies in light of their philosophies and practices.

The alternative was to consider people's perceptions of the object. I decided to make use of persons and their views and perceptions as the object, and thereby not to limit my research to a few select organisations. People with experiences in leadership development and the design of leadership development systems, would provide personalised views developed over time, and with interaction of various organisations. The contributions would thus benefit from a diversity of experiences that shaped the participants' views, and not limited to views or policy within select organisations. My view is thus that (a) the phenomena studied are leadership development systems, and not a leadership development system within a particular organisation, and (b) that individual participants with a depth of experience could bring insight from their experiences and perceptions concerning leadership development systems. These departure points, I believed, would also contribute to the perceived transferability of this study.

I will never forget the wonderful people who agreed to take part in the study and how enthusiastically they shared their experiences and views with me. I enjoyed every

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meeting and time spent with each of them very much. I observed many inspiring thoughts they had regarding leadership and leadership development, and sensed with all a passion driving their perceptions of leadership and its development, whether as practitioner, academic, or organisational leader. A brief account is made of participants in section 3.4. I do however wish to highlight some contributions made that touched me in my role as practitioner.

Alpha shared views, with an observable passion to drive inter-generational learning within complex, uncertain and volatile organisational environments. Especially striking was the following: “There is a paradigm issue in knowledge is power as it implies that knowledge is to be owned...”

Bravo shared wisdom based on many years as academic and practitioner. Outspoken and with brutal clarity not shying away he expressed views and experiences that cut deeply into the essence of leadership and its development. Matters of authenticity, motive: “Adding development to a toxic environment make the toxicity worse; first deal with the base motives.”

Charlie shared a passion for integrating history and leadership. Charlie believed that an understanding of past leadership contributed to an understanding of it in the future: “...if you do not understand the past you cannot be future oriented.”

Having worked with leadership systems Delta provided valuable insight from practice. Clear-headed and clinical were his thoughts and experiences of leadership system dynamics: “We experience leadership from the next higher level, if your manager is not a level higher, then your experience is not an experience of leadership. The cognitive pictures you see is the same of that of your supervisor and you do not recognize a value add to your work, and role confusion etc. commence.”

Echo emphasised, with an energetic personality, a fundamental role of learning functions’ head: “My perspective is, if the head of learning is not in the room helping shape those conversations, you may as well outsource it to a business school that brings you programmes.” Echo’s contribution is much more than this particular statement, and a bold reminder of the responsibility of the learning practitioner above sales persons.

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Foxtrot champions individuals and their capacities. A compassionate practitioner she portrays deep understanding that leadership development is all about people. Amongst others, she saw the development of the person in his or her own context, rather than as what is found in normative models. “But I do not think that there are sufficient frameworks to help people out of that and to orientate themselves in the context, in their own ability and their own capacity to think, their own relationship.”

The soft-spoken Golf, shared viewpoints painting a future picture of practices, capacities required and environments. Striking was the remark that should be taken to heart: “Not just to reflect, but to think, to think critically about humanity, society, environment. Leaders (must) take stock; think about what matters.”

I met Hotel, who was passionate about leadership and leadership development, in a noisy public space. The noise did not bother her as she highlighted: “Your leader sits here, it’s not one person...” She explained that the person considered a leader represented multiple voices. In addition to participating in an interview, Hotel became a thinking partner in explorative conversations.

India shared deep-cutting explanations regarding issues that affected leadership and leadership development. Having concluded the interview I was shaken as many of the issues mentioned applied to my immediate environment at the time. I realised that I had to put this aside. Nevertheless, one highlight that struck me was; “The way we [organisations] are structured...forces people who are not leaders to end up in leadership positions.”

Juliet, leader of a corporate setting in a multi-faceted environment was passionate and dynamic about leadership and leadership development that were anchored in a future-oriented purpose. A comment that stood out is: “Just because you made things work, does not mean that those skills are appropriate for a new context.”

My initial motivation to provide a little context about the interaction with each participant was to make participants alive, more than letters on paper. However, on second thought, those matters I observed and shared with participants could be personal lessons to me as practitioner in the development of leadership. I list those leadership lessons as a summary, in the participant order of the previous discussion:

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- (a) Knowledge is not owned anymore.
- (b) First deal with the base motives.
- (c) The context, in time, contributes to an understanding of leadership.
- (d) Cognitive pictures and the diversity thereof are important to experiences of leadership.
- (e) Be in the room and help to shape conversations.
- (f) Leaders function in a context, with their own ability, their own capacity to think, and their own relationship with context.
- (g) Leaders think critically about humanity, society, and environment and take stock about what matters.
- (h) Leaders represent multiple voices.
- (i) Organisation structure moderate leadership talent.
- (j) Those skills may not be appropriate for a new context.

### 6.8 DATA ANALYSIS

My data analysis kicked off with open coding, as explained in Chapter 2. My initial attempts were per data set and this practice was later adapted to consider themes across data sets. I enjoyed the process as a starting point of a journey of discovery.

I observed, with the process of surfacing themes per data set, that I had to pay particular attention to clear my mind from other voices; meaning thoughts of my own at that time or recollection from potentially earlier interviews. I found this to happen, in particular when I had transcribed a second interview before I considered thematic themes from the previous interview. This may be a matter unique to me; however it made me focus to be present with the data that is in front of me. It also made me become aware of, and suspend other voices including my own. I made notes of voices I found of interest. Revisiting those notes was, however, useful in considering themes that ran across data sets.

I found that I had to guard myself against venturing into narratives about themes that were not grounded in the complete process of data analysis. As much as participant observation is an element to this research, I believed that I contributed in ways to complement data, and not generating themes purely based on my own views. Yes, my views are part of the themes generated, however, I took care that the themes were

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grounded in field data.

I realised at the initial stage data analysis that I might dwell in detail complex consideration of data and meaning associated with those details in themes. I considered that a risk as, I believed, it amounted to summaries of recurring aspects in themes with a subsequent verification with extant literature. The product, I believed would be a list of detailed considerations most likely to contribute to policy and practice development within a development system, which is not within the scope of this study. A more dynamic view to data, I believe, implies constructing meaning from themes, with its aspects, in its relation to other themes with its aspects.

I found, provided the quest to attain a dynamic view or meta-view to data, that participants' contributions provided detailed viewpoints making use of different levels of analysis to leadership and its development. Some participants considered leadership, and its development, from an individual viewpoint, others made use of team, organisation, or development viewpoints. These I considered good and well, as the different points of view provided a diversity that allowed deeper insight into what informed a leadership development system in terms of organisational context, where an influence on the development system is a differentiator, and not the leadership level of analysis. I inserted diagrammatic notes that I made during the process of the study, on the following pages, that illustrate my alternative views to frameworks of consideration from more detail complex and dynamic view to data, as explained with the preceding.

Figure 6.1 illustrates notes I made of possible considerations to the design of a development system as derived from field data, and establishes a detailed relation with data. I believe the diagram illustrates a valid frame of consideration to development system design, but in my view it does not provide a meta-understanding of considerations, or sufficient meaning from themes in their relation with other themes.

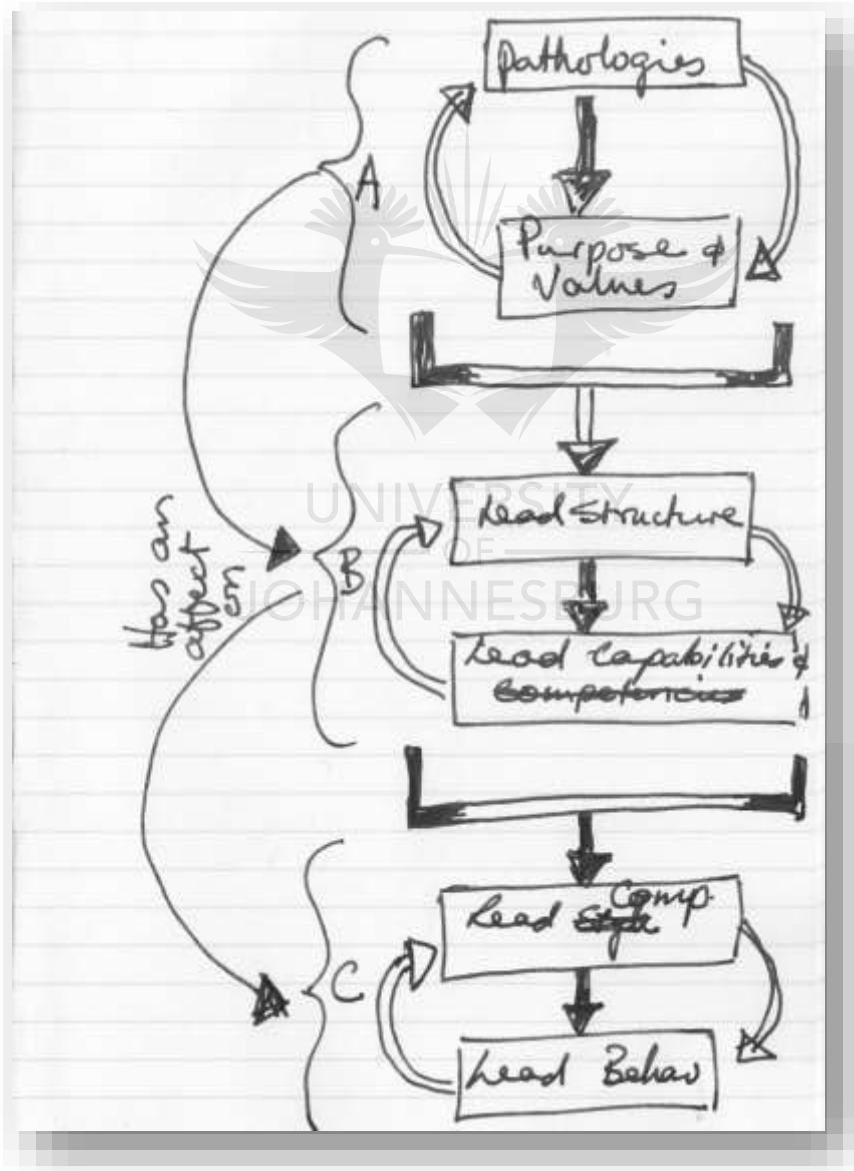
I was of the view that, should the level of analysis to leadership become a primary differentiator to the development system, the focus was likely to result in differing management and leadership skills required in leading an organisation. These are different than contextual considerations that affect the design of a development



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system. It is evident from Figure 1 that units of analysis drive the differentiation of design considerations.

Figure 6.2 provides an extract from a note I made that provided a different view to considerations that affected the design of a leadership development system. The meaning I made from data is different from that I presented with Figure 6.1. The meaning I made, and jotted down as work in progress with that note, presents an integrated meaning made by consideration of interrelationships between thematic categories towards a more conceptual understanding of influences to the design of a development system.

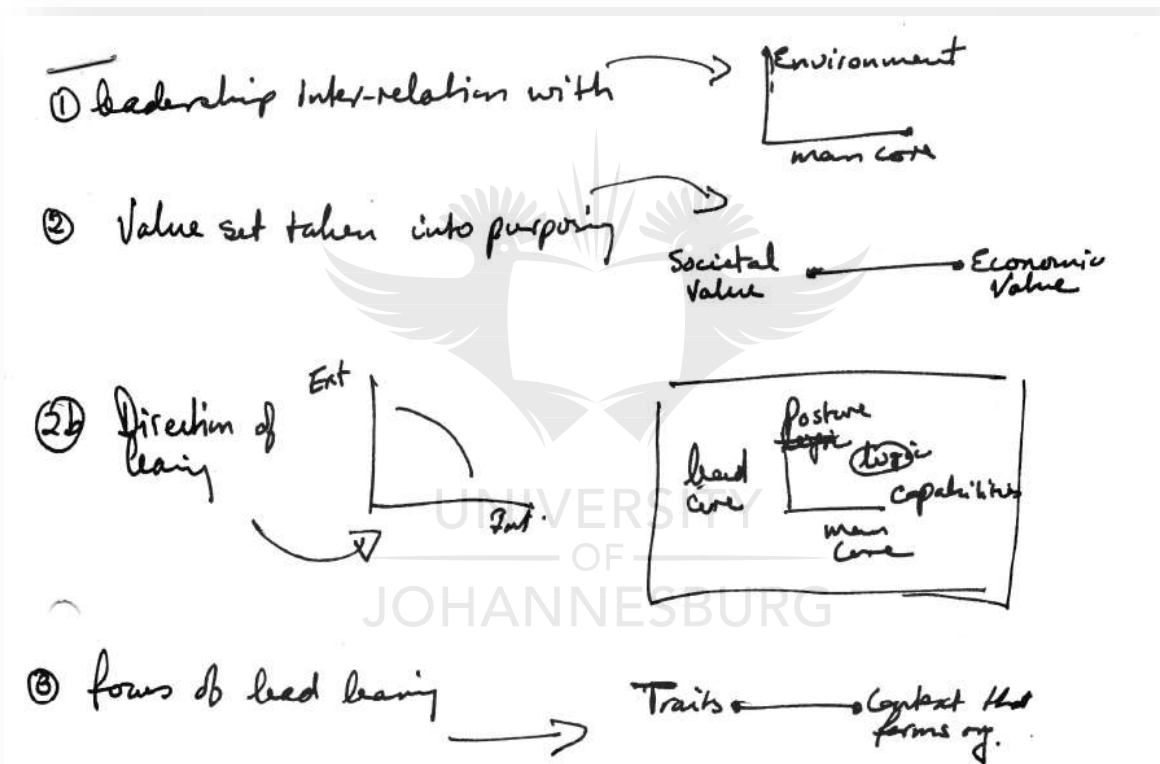


**Figure 6.1: Notes I made of possible considerations to the design of a development system**



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It is noticeable from the extract of notes with Figure 6.2 that my thoughts shifted from a more concrete or detailed view to potential design considerations towards relational considerations that transcend finite positions to, for example, purpose, pathology, leadership structure, capabilities, competences, and behaviour as reflected with Figure 6.1. I refer to relational considerations as (a) they are derived from an integrated view to data, and (b) they present choices or alternatives in practice by leadership, but at the same time characterise a relationship with the organisational environment. Note that it is my view that those choices or alternatives practiced by leadership may not be optimal in terms of the organisational strategy and context.



**Figure 6.2: Variation to the location of leadership system complexity and its relation with the character of a development system**

### 6.9 CONSTRUCTING THE THESIS

*(Writing a thesis or dissertation) is the final hurdle to be cleared and sometimes poses the biggest problems for the first-time researcher. ... (F)ew people master the art of writing scientifically overnight. To put together a coherent, logical, clear and persuasive argument ...*

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*usually involves repeated practice, many drafts, and a great deal of effort and even frustration (Mouton, 2001, p.112).*

*As you move into the writing process, ... you (need) to keep in mind that, despite the gains of qualitative methodology, qualitative researchers still face challenges in terms of how best to write the account of an inductive or iterative process in a conventional way so as to make it listened to by others (Tracy, 2013, p.270).*

I made use, to some extent, of various writing styles in constructing the thesis. I made use of a scientific tale as formal and logical (Sparkes, 2002), where applicable, within the majority of Chapters 1, 2, part of 3, 4, 5 and 7. This practice to write scientific tales did not come easily as it was not a skill that I practiced regularly prior to this research. I found that I built arguments making use of multiple paragraphs to form one argument, whereas some believe it better to create an argument within a paragraph. In addition, and to make reading more difficult, is my habit of making use of long sentences. I had to continually be aware of the aforementioned issues.

I employed a more realist tale with Chapter 3 where I presented field data with specific references to the voices of research participants. I believe that, in comparing this writing style with the scientific style, this style was easier in my experience in drafting this thesis. I presented field data and made use of participant voices, and it was possible to imagine the participants around a table in conversation while I was documenting the conversation.

In Chapter 6, The Research Story, I employed a confessional tale in writing style and offered some backstage stories to the research. I found this, in comparison with all the other writing styles, the most difficult. My difficulty was perhaps not with the style of writing, but with the content where I had to write, a little, about myself. This chapter does however allow the sharing of personal reflections about the research process. This I enjoyed as there were some key moments in the research process that I wished to share. The first of the moments I wished to share was the distilling the research topic, secondly, the personal realisation to follow data, and not to pre-empt findings, and lastly, about scheduling the research process.

## 6.10 THE APPRENTICESHIP: SUPERVISORS AND I

Enrolling in a doctoral study at a university department like IPPM, implies being trained as researcher or scholar while “...working under the guidance and supervision of an established and experienced scholar” (Mouton, 2001, p. 16).

*There is general consensus in the literature that the supervisor should at least perform the following roles: (i) Advising the student in managing the research study; (ii) Guiding the student through the research process; (iii) Ensuring that the required scholarly quality is accomplished so as to make certain that the necessary opportunities are created to pass, (iv) Providing emotional and psychological support when required. I deem each of these roles to be equally important in ensuring a successful academic apprenticeship outcome (Swart, 2014, p. 59).*

Lee (2008) offers the following rolls of supervisors:

- (a) Where the focus is on project management and thus practical advice (functional);
- (b) Where the supervisor plays the role of gatekeeper to the academic community and encourages the student in becoming a member of an academic discipline (enculturation);
- (c) Where the promoter encourages the student to question their work and employ an approach of constructive inquiry (critical thinking),
- (d) Where the student is mentored and coached in developing himself or herself (emancipation),
- (e) Where the supervisor establishes a quality relationship by means of emotional intelligence to inspire and motivate the student (relationship development).

I had the pleasure to have two supervisors to my research study. I have already mentioned Doctor Viljoen and her role in my commencing with the research as well as selecting UJ as institution. Doctor Viljoen greatly assisted me with advice, in particular, in the commencement phase of the research. Furthermore, Doctor Viljoen continually

encouraged me, in subtle ways, to question my own work and to work independently.

My second supervisor is Professor Schurink who is primarily a methodologist. My learning, with completing this research study was not merely functionally in terms of leadership development systems. The learning included learning about methodology in research. This is an area that I knew I had to learn about but I was not very excited about the prospect thereof. I guess that a fear of an unknown influenced my initial viewpoints.

Professor Schurink made me enjoy the practicality to methodology in research projects. My experience of research methodology shifted from an apprehension towards a view that methodology, with its theory, could be enjoyed as practice and experience. Professor Schurink was of great help in managing the research project, guidance to the research process, whilst keeping an eye on the scholarly quality being adhered to. I am grateful for Professor Schurink's willingness and availability to listen to me.

## **6.11 OTHER BACKSTAGE ASSISTANCE**

I believe it necessary to mention oom Jan Nel who assisted me with language editing of the thesis. Oom Jan made an immense contribution in short time frames. I enjoyed oom Jan's enthusiasm.

## **6.12 FAMILY, CAREER AND HEALTH**

I believe that the researcher's personal context do have a direct relation to a research project. This personal context affects or is being affected by the on-going research. There is thus a inseparability of the researcher's life and other facets of his or her life, especially career and family (Ngunjiri, Hernandez, & Chang, 2010; Vilakati, 2020, p. 343).

### **6.12.1 Family**

I deeply appreciate the support I experienced from my wife and children in this long research journey. Even more, I recognise and appreciate the sacrifice there was for my family in me conducting and writing up this research.

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While my wife's interest and support to the study was encouraging she was sincerely inquisitive about my personal growth with this research journey. I did, however, understand that my study disrupted my role in the family. Acutely aware of my responsibility I did my best to continue assisting with the house chores and other family responsibilities. However, the study in taking five years which was longer than was anticipated had its toll on me and my family. I understand perfectly well that my wife and the children wished to see its end for some time. I will always be very grateful to them for their patience, and the sacrifices they made.

### **6.12.2 Career**

I had, in the period of this research project, changed roles at my place of work. This change had its own demands, and required me to settle into a new role. I can remember that my anxiety levels, at that time, rose quite a bit in my effort to balance career, study, family and personal life.

My responsibility at work is focused around leading a corporate function to management and leadership development. This entails working with 14 client departments, various stakeholders to the development of leadership, and partners in developing leaders.

I believed that I was fortunate to have a research topic that was so closely related to interests and challenges I experience as a leader in leadership development. I believe that I could relate to the study in a practical manner, but also to guarded that I am only one participant to this research. My view about the fortune of a research project so close of my area of work did change in time. I believe this change of view was mainly based on a need for more variety to the way I spent my time as most of my time I spent on similar themes.

### **6.12.3 Personal health**

I am blessed with good health. However, good health as with other blessings is not something to be taken for granted. I experienced a health setback in the period of working on this study. My neurologist was of the opinion that I might have suffered a mild stroke. This made me feel vulnerable.

I refer to this occurrence as a setback mainly because it demanded a change in my focus on diagnosis and recovery; a process that was not part of my ordinary life at that time. A different change of focus did, however, also take place, which in hindsight was not a setback. I felt compelled to slow down a bit and to rethink large parts of my life, my work, career and, importantly, my family and relationships with others. I am, in a sense, grateful to have been sufficiently shaken to start to think about and distil priorities, different priorities than before.

## **6.13 EXAMINATION**

Understandably reaching the point where the thesis must be finalised for examination normally creates anxiety and doubt whether one has done enough. I experienced anxiety as the submission date for the thesis drew closer. I wondered whether I would be able to complete everything required for submission at a standard to which my study leaders agreed. The anxiety was not necessarily about the ability to attain that standard. The anxiety was more about the pace at which the trilogy, myself and the two study leaders, advanced as a collective.

### **6.13.1 Attending to feedback**

I need to indicate that this section is written after I have received and attended to the examiner's reports.

I remarked with the introduction of section 6.13 that I experienced anxiety as the submission date for the thesis drew closer. I submitted the thesis in October 2020 with a great sense of relief. The relief was not only about submission, but also about the fact that I had weekends without feeling the need to be behind my desk working on the thesis.

I expected to receive feedback from examiners during January 2021. And I again became anxious as time passed, drawing closer to the period I anticipated to receive feedback. I had thoughts about whether my submission was to the standards the examiners would expect, and about the possibility of extensive amendments required to be made to the study and, or reporting.

I received the examiners feedback from Prof Schurink who first called before

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forwarding the comments to me. The call was reassuring, however, it did point to a few matters needed to be addresses. I am glad, upon reflecting back, that Prof Schurink chose to have a short conversation with me to introduce the feedback from examiners. Dr Viljoen also called at that time and we had an encouraging conversation.

The examiners was gracious with their comments. I was, in a sense, taken by surprise with the suggestions made about the value of the study. I believed that I am making scholarly contributions, but the extent of positive feedback about that scholarly contribution took me by surprise. Select comments made by the examiners are:

*The choice of the topic is very relevant as this is (a) an important topic for business success and (b) limited research available on this topic.; Leadership, HRM, and strategy are three key areas in modern organisations, and I praise the fact that the candidate's research deals with the three areas at the same time, which has been seldom done.; ...the candidate showed a clear contribution of the research on a methodological, practical and theoretical level.; ...applicable regardless of context e.g. mining, manufacturing or services, which makes it useful.; ...many sections where theory and practice meet to produce novelty are outstanding.; and ...an emerging theory blending strategic leadership and HRM. I enjoyed reading this chapter, as it presents several new thoughts that have the potential to develop into new conceptual instruments in the area.*

There was, as to be expected, comments that pointed to corrections to be made. The extent of these were not far reaching, and could be confirmed by my supervisors. I point to a number of corrections made.

Some feedback was made about technical matters as typing errors, referencing, and the readability of some figures. I attended to these matters, and enlarged figures in chapter 5 to render the Strata Frame framework more readable. Other feedback pointed to aspects that did not come across clearly in text. It was remarked that clarity is required whether my GT approach was related the approaches advanced by Glaser or Charmaz. I returned to the text to point out that my GT approach with its



constructionist application relates to Carmaz's version GT.

A comment was made about clarity about where the adopted quality criteria were discussed. The examiner pointed out that these are discussed in chapters 2, 6, and 7. I subsequently made sure to point out in section 2.6.5 that the application of quality criteria are discussed in chapter 7.

A further comment that pointed to clarity was about the number of interviews conducted in relation to the number of participants, and the initial sample; and the protocol employed. I revisited section 2.6.2, Data Collection, to make adjustments for greater clarity to descriptions already provided. I made further explanation about my protocol with interviews to point to my use of a standard question with which the interviews commenced, and that I made use of insights gained during an interview to guide that interview. And, in addition, that insights gained from interviews contributed to later interviews as themes to explore. This practice was within the application of conversational, semi structured interviews and my constructionist stance.

#### **6.14 LESSONS LEARNT**

*Ideally, any study you complete would not only advance knowledge in your discipline but also influence your own professional practice. The most meaningful research journey is the one that provides you with new information to do your job—and live your life—more effectively (Kotter & Minichiello, 2010, page 7 of 15).*

I find the statement by Kotter and Minichiello especially true to my experience in terms of this study. I now have another perspective when looking at leadership and its development in organisational context. I believe the architecture developed with this study provides a fundamental logic to understand leadership development systems.

I have learnt, perhaps more significantly, a few lessons about life during this journey. Firstly, I learnt to be patient with processes. Some processes need to unfold with time, and that such a process is better understood as time goes on. A second lesson I learnt is not to value relationships at face value. The value in,

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and of any relationship is not always what it is proclaimed to be.

A last lesson I learnt is about my communication style, more specifically my writing style. I have learnt that my writing style makes it difficult for people to follow the message I attempt to communicate. I am, in light of this drawback, particularly appreciative of Professor Schurink's and Oom Jan's efforts in support and advice to nudge me towards different ways.



## CHAPTER 7

# SUMMARY, CONCLUSION AND RECOMMENDATION FOR FUTURE RESEARCH

### 7.1 INTRODUCTION

In this concluding chapter I (a) consider the research output in term of the research aims and questions, (b) contemplate the value and contributions of the research, (c) re-emphasize its delimitations and limitations, and (d) offer what I believe need to be considered in future research.

### 7.2 RESEARCH QUESTIONS ANSWERED

I commence to consider the research output in terms of the research aims and questions presented within Chapter 1. The study's objective was to provide organisational leadership development architecture as a fundamental framework to an intentional and future-oriented leadership development system. I stated the following research aims:

- Identifying and reporting on considerations to the design of an intentional and future-oriented leadership development systems from field data;
- Differentiating considerations to the design of leadership development systems into a frame of interrelation; and
- Constructing a series of considerations and logic to their effect on the design of a system for the development of organisational leadership.

The above-mentioned aims were operationalised with three research questions namely:

- What are considerations, from participants' perceptions, to the design of intentional and future oriented leadership development systems?
- How are considerations to the design of leadership systems differentiate into a frame of inter-relation?

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- How does a series of considerations form logics that affect the design of a system for the development of organisational leadership, as organisational leadership development architecture?

### **7.2.1 Research Question 1: What are the considerations to the design of intentional and future-oriented leadership development systems from the participants' perceptions?**

I adopted a research strategy based on grounded theory. In doing so I considered perceptions of participants to the design of intentional and future-oriented leadership development systems. My research findings, as a product from open coding, are presented as a narrative in Chapter 3. The findings describe thematic categories formed from data by making use of open coding. These thematic categories, presented in Chapter 3, form the basis to considerations to the design of intentional and future-oriented leadership development systems.

The analysis of data did however not end with open coding. The product of axial coding is presented with Chapter 4. My axial coding was a continuation of analysis with the consideration of interrelationship between categories towards a conceptual whole as a theoretical framework (Strauss & Corbin, 1990; Walker & Myrick, 2006; Locke, 2001). In doing so I moved away from data incidents and thematic categories to consider the meaning of categories and interrelationships between them to form conceptual categories. (Bloomberg & Volpe, 2008) I believe the conceptual categories together with their properties present areas of consideration to a development system.

The process of axial coding showed the categories Making Sense; Purposing and Cowardice; and Dual Cores to be central as they had the greatest relative influence on other categories. I concluded to make use of those mentioned categories as bases to further theory development.

The insight gained from understanding the thematic categories in terms of others brought different meanings. These different meanings are a shift from thematic to a conceptual understanding of categories, which assisted me in achieving a point of conceptual reduction, described by Locke (2001 p. 52) as a sense of a “commitment to tell a particular kind of story.”

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This understanding to the central categories represents considerations to the design of intentional and future-oriented leadership development systems. Note that even though I attributed different meanings to the central categories that I maintain the thematic category names. The integrated or conceptual meaning to the central categories is provided in Table 4.10 in Chapter 4.

The conceptual meaning to the central categories presents major areas of consideration to the design of a leadership development system. It furthermore allows a funnelling of focus on the categories towards its properties. I considered properties to be either considerations to the design; principles in design; or enablers to a development system. I considered considerations to be variable; principles to present beliefs to a development system; and enablers as properties to a development system that is variable but has an overall effect on the development system regardless the choices made to the variable considerations. I elaborated upon these dimension in Chapter 4 and provided a summative table as Table 4.11.

For ease of reference, I provide the considerations; principles in design; and enablers to the design of intentional and future-oriented leadership development systems with the bullet lists below.

- **Considerations to the design of intentional and future-oriented leadership development systems**

The central categories' meaning, as already reported in Chapter 4, presents major areas of consideration to the design of leadership development system. These areas of consideration are (a) Surfacing and cultivating organisational philosophies; (b) Cultivating the quality of the leadership system's thinking; (c) Cultivating vertical alignment; and (d) Being receptive to "step-up".

Specific considerations to the design of a leadership development systems, other than the conceptual meaning to central categories, are listed below, as questions. These specific considerations, as questions, originate from contrasting elements I discovered in data during axial coding.

- What is the organisational orientation to value creation in its relationship with

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its environment?

- What are the strategy levers that frame the organisational choices in value creation?
- What is the pattern to the leadership system's thinking capacity?
- What is the logic to organisation learning?
- What is the leadership system's appreciation of the organisational environment?
- What is the focus to the leadership learning: leadership in the organisation, or leadership of the organisation?
- Does the organisation have the capacity to detach from dominant knowledge structures, between tiers of the organisation?
- What is the required lower limit of collective and individual thinking capacity provided the strategy logic of the organisation?

The considerations listed above present choices that form four possible development systems. Each of those development systems has a specific character, and drives different leadership system capacities. These development systems are highlighted with a later sub-section.

I have already mentioned that the conceptual meaning to the central categories presents considerations to design, principles in design, or enablers to a development system. The first mentioned has already been pointed out. The following lists present principles in design, or enablers to a development system. The principles to the design of leadership development systems are:

- Organisational purpose and the strategic posture of an organisation surfaces at the highest level of the organisation. That level together with a next level of leadership forms a strategic logic. The strategic posture of an organisation reflects, amongst others, the organisation's orientation to value creation.
- A thinking capacity exists with the organisation's leadership system. This capacity may either be patterns of Skilfulness or Wisdom or a combination of the two.
- Logic to learning exists within organisations. This logic to learning can either be Maturation or Transformation or a combination of the two. The logic to learning

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frames a preferred future.

- The complexity of the organisational strategy logic affects the learning and decision-making capacity required. Changes in strategy complexity require changing interplay to learning logics and patterns to leadership system's thinking capacity.
- More complex strategy logics require different capacity and capability presented within the organisational culture to reflect a similar complexity than the organisational strategy.
- Change to organisational knowledge structure can firstly take place at a level higher than the affected leadership system capability. Alternatively, change in knowledge structure is confined at a level of the affected organisational capability.
- The cascade of differentiated individual and collective thinking capacities and associated discretion to decision-making is tied to the complexity in strategy logic.

I consider enablers of leadership development systems as properties to development system that has an overall effect on the development system regardless of the choices made to the variable Considerations. These enablers are:

- A leadership system is capable of articulating the required organisation capabilities, culture, the type of strategy to be executed, and the associated collective leadership capabilities.
- An authenticity to the leadership systems that transcends tiers to that leadership system, and its organisation in context.
- A leadership system has the required individual and collective thinking capacities and associated discretion to decision-making.

### **7.2.2 Research Question 2: How do considerations to the design of leadership systems differentiate into a frame of interrelation?**

The above listed considerations present choices for a frame of interrelation consisting of four possible development systems. Each of those development systems has a specific character, and drives different leadership system capacities as informed by



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choices made to the already listed considerations in design of development systems.

This variability to the four development systems establishes four logics associated with respective development systems. I continue to refer to the four development systems with their logics as a frame of default development systems. The four default development systems together with their characters or logics are summarised with the following bullet list.

- Development System 1: Strong Frame, which is characterised by inter-relation of; Competitive Dominance as orientation to value creation; leadership system's thinking capacity patterned to Skilfulness; learning logic of Maturation and with the Competitive Dominance the basis of meaning of a preferred future. The environment is viewed as technically rational in which the system capacity wishes to dominate; with organisational learning focus on leadership traits and competence of behaviour aimed at becoming more skilful in achieving efficiency. Change takes place with an organisational system capability and is tied to knowledge structures that drive current leadership routines and patterns of interaction.
- Development System 2: In Transit, which are characterised by inter-relation of: Competitive Dominance as orientation to value creation with a leadership system's thinking capacity patterned to Wisdom. A logic to learning is Transformation, but elements of Maturation remain to achieve, complete and dominate efficient capabilities. The leadership system learning focus is a combination of Transformative and Maturation. It places emphasis on leadership traits and competence of behaviour to be skilful in achieving efficiency in organisational capabilities. It focuses, at the same time, on practices of creating meaning; collective capacities; the use of networks; cooperation and collaboration; and new and different ways of making use of user-generated knowledge. The learning focus challenge dominant knowledge structures, patterns of interaction and activity, and presents an adaptive component to learning. Change has the risk, even though with knowledge structures at levels higher than the affected organisation capability, of being inhibited by path dependency and structural inertia.
- Development System 3: Awaiting Shock, which is characterised by inter-

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relation of a causal interdependent disposition to value creation; leadership system's thinking capacity patterned to Skilfulness; learning logic of Maturation; with the leadership system learning focus is likely to be on leadership traits, competence of behaviour aimed to internally reinvent within existing structure and activity towards maturation within that structure.

- Development System 4: Dynamic Canvass, which is characterised by interrelation of causal interdependent disposition to value creation; leadership system's thinking capacity patterned to Wisdom; learning logic of Transformation; and a leadership system learning that is focused on the context that forms leadership in the organisation, and associated transformation. This implies the capacity to all tiers of the organisation to detach from a dominant knowledge structures and patterns of interaction, but to maintain a strategic logic interrelation between tiers, with a dynamic interplay and emphasis on patterns and logics of learning, within and between tiers.

### **7.2.3 Research Question 3: How does a series of considerations form logics that affect the design of a system for the development of organisational leadership?**

The variability to the four development systems establishes four logics associated with respective development systems. I summarised those with the bullet list to section 7.2.2. This mentioned variability to the four development systems do present four logics, which I consider as a detailed logic associated alternative choices with different paths of action.

The considerations already discussed, and associated choices in the design of development systems bring about a *theoretical frame of development systems*, as described in Chapter 5. The frame consists of four systems that have different and specific characters that are derived from the choices made with the considerations. These characters present different logics to the design of a system, with four different outcomes in leadership system capacities.

The conceptual categories did however form a dynamic logic in a theoretical frame formed during my selective coding. The four development systems, when overlaid onto the Strata Frame, integrate strategic complexity to development system logic. This

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overlay provides a perspective of the four development systems in terms of strategy complexity and associated capability required from the organisation in leadership. This addition provides a dynamic logic to the theoretical frame of development systems. Any of the four development systems may be considered better aligned to organisational strategy drivers and associated capability required by a leadership system. The four development systems, each with a different character, now have an interrelation with complexity of business strategy, and the associated capability required by the leadership system.

The theoretical frame of development systems now allows consideration of an organisation's present business strategy together with the required capability by the leadership system. The character of the present development system can be compared with one of the four conceptual default development systems, and is located within it. The Theoretical Frame allows consideration of the character of the development system present within the organisation.

Comparison between the complexity to a leadership system with the character of the existing leadership development system may suggest; (a) that the existing leadership development system aligns with the complexity of the leadership system it drives, as illustrated; or (b) that the existing leadership development system does not align with the complexity of the leadership system it is meant to drive.

Variation results in; (a) a development system that does not support or drive the leadership capacity required in light of the business strategy, which causes the development system to become misaligned; (b) a development system that supports and drives the leadership capacity required by business strategy, which makes the development system aligned; and (c) a development system that supports a leadership complexity greater than what is required at the time by the business strategy, which makes the development system differently aligned.

### **7.3 UNIQUE CONTRIBUTIONS**

The value of the research resides in its contribution to Strategic Human Resource Management with the theoretical frame the study presents as architecture for the development of organisational leadership capacity. This architecture provides a series

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of considerations with associated choices that affect the logic to the design of development systems. I consider this architecture a locus of value as it provides choices that guide system design or potentially the transformation of existing systems in the light of organisational strategic environments.

The architecture provides four default development systems, with their respective characteristics, or logics that respond to different strategic contexts. The root to the four default development systems is predominant dispositions to value creation associated with Making Sense, and the leadership system's patterned thinking capacity associated with Purposing and Cowardice. These logics, linked to organisational dispositions to value creation, and the leadership system's patterned thinking capacity are a unique contribution.

The four default development systems, with their respective characteristics and logics, are linked, making use of a Strata Frame to strategy complexity and associated capability required by a leadership system. This addition provides a dynamic logic to the architecture as any one of the default development systems is considered to better align with specific organisational strategy drivers and associated strategic complexity required with a leadership system. This provides a unique contribution with dynamic logics, together with the unique heuristic use of Stratified Systems Theory to present the dynamic logic to considerations in the design of leadership development systems.

The architecture, as it is explained, is built on a different understanding to the metaphor of architecture. The typical use of that metaphor within the human resource environment considers architecture as the set of human resource management philosophies, policies and practices or combinations of those. I consider architecture, with this study, as a framework of considerations to a development system design with associated choices, in light of organisational context, that affects the design and function of the development system as a whole. These considerations support an architectural logic to the development system design in light of the desired system outcome.

The study, in line with its purpose, makes use of Stratified Systems Theory with its value in its capability to differentiate between work levels in terms of discretion/intention. However, in this study that theory is neither applied to an

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individual manager's work or practice. Rather, it is employed as an organising framework to frame the complexity of organisational strategic postures to which a development system needs to respond.

### **7.4 DELIMITATIONS**

The research did not include the study of leadership development practices as employed, or suggested to be employed, at specific organisations. I consider, provided the research purpose, perceptions of leaders in management and leadership development to create organisational leadership development architecture. I consider participants' insight to the design of leadership development systems and not practices at specific locations. It is for this reason that I consider participants' perceptions to the design of leadership development systems the subject to the development of architecture and not locations where leadership development systems are in place.

The study considered the perceptions of leaders in management and leadership development. It did not consider perceptions of people in the process of being developed and managers or leaders, nor people who are not in leading or management positions. The use of leaders' perceptions are by design as the study attempts to make emphasis to matters from the organisational strategic environment, that influence the design of a leadership development systems. It may be of value, in future research, to consider perceptions of people being developed and managers or leaders, and people not in leading or management positions.

The study did not consider any specific Human Resource Development policies and practices as what may typically be considered with Human Resource Management architecture. The view is, with this study, that architecture provides a series of contextual considerations, a variety of default development systems with their respective characteristics as logics that respond to different strategic contexts. These are considered a basis to the design of a development system, and subsequent development of human resource policy and practices.

### **7.5 FUTURE RESEARCH**

It has been reported, within this chapter, that human resource development policy and

practices are not within the scope of this study. It will be of use to examine different leadership development models and associated practices as it relates to the logics of the four default development systems. This would be of particular practical use to practitioners in a coherent selection of development practices aligned with alternative organisational strategy options.

The study brings about architecture, in the choices and associated logics it presents, to the development of organisational leadership capacity. This composes four respective default development systems with logics. In addition, the architecture presents a dynamic logic as the development outcomes are linked, making use of a Strata Frame, to organisational strategy complexity and associated capability required by a leadership system. It may be of use to explore the possibility of variation to this dynamic element of the architecture developed, within different economic sectors.

## **7.6 REVISITING QUALITY CRITERIA**

I first introduced the quality criteria to this study in section 2.6.5 of Chapter 2. The criteria are the principles of credibility, transferability, dependability and conformability, as developed by Guba and Lincoln (1994), as quality criteria to this study (Bryman, 2012, p. 390).

**Credibility**, interpreted by Bitsch (2005), relates to the “correspondence” between the researcher’s description of participants’ perspectives and the actual perspective of the participants. This criterion is typically the matter of internal validity with quantitative research (Bryman, 2012).

Credibility refers to a characteristic of grounded theory methodology of “Employing constant comparison at each analytic stage” (Charmaz, 2006, p. 5). The primary mechanism to achieve credibility was comparison of data from different sources to inform conclusions (Bloomberg & Volpe, 2008). A practice was adopted to prompt participants’ views to the meaning made from already surfaced constructs to categories. Credibility was addressed by making the voices of participants part of the data; I offered extracts from different participants’ accounts in creating thematic categories. Furthermore, comparison was made of interpretations from field data with extant literature (Pelser, Bosch & Schurink, 2016) to gauge their accuracy. Finally, I



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employed theoretical and methodological triangulation as used by Pelser, Bosch and Schurink (2016).

A further criterion to quality research is **transferability**. This quality considers the extent to which the research results are applicable to environments other than the research environment (Bitsch, 2005). Transferability parallels with external validity in quantitative research (Bryman, 2012).

Krefting (1991) points out that transferability may not be a matter for consideration in all qualitative research. This thesis, by its purpose to develop architecture for the development of leadership capacity, implies generalisation, and therefore transferability becomes a matter of consideration. Transferability is dependent on, according to Bitsch (2005), the view of the individual who intends to make use of the findings. The researcher can assist such decision with description of research participants and contexts (Bitsch, 2005).

The participants selected to this thesis are Gauteng based, and have insight to a combination of; (a) leadership and its complexity; (b) leadership systems and their development; and (c) performing leadership roles within the function of leadership development. These qualities to the participants are illustrated in Chapter 2.

Transferability is also considered in light of the research context. I wish to point out, in light of the research context and context to participants, that the phenomenon researched is not located within a specific location or context. The phenomenon researched is design of leadership development systems. I therefore considered participants who could bring insight to the design of leadership development systems as potential data sources. It is for this reason that I considered individuals who could bring insight to participate in the research, and not locations where leadership development systems are in place.

It should therefore be noted that the subject to the study was not leadership development as an organisation, but leadership development as a phenomenon. Research participants provided their perceptions to leadership development system in light of the experiences in various positions and projects, and not limited to one organisation. Bloomberg and Volpe (2008, p. 78) hold the view that transferability “is



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*not whether the study includes a representative sample. Rather, it is about how well the study has made it possible for the reader to decide whether similar processes will be at work in their own settings...*" We assist the reader's decision concerning transferability with the overview provided of participants, and a "richness of the descriptions included in the study..." *to allow the reader a "shared experience"* (Bloomberg & Volpe, 2008, p. 78).

Bitsch (2005, p. 86) refers to a third criterion, namely, **dependability** as "stability of findings over time," whilst Krefting (1991) relays dependability as consistency of findings, and links the concept of auditable (Guba) to dependability. Dependability parallels with reliability criteria in quantitative research (Bryman, 2012).

"Auditable" implies, as Krefting refers to Guba, the possibility that another researcher may follow the researcher's decision process. I attempted to enhance dependability by deriving an acceptable strategy for qualitative sampling, employing methods of data collection, analysis associated with qualitative research, and outlining the key steps I took during the research process. Field notes and memos provide insights to different views to data and the emerging categories and their interrelations. This, together with the documented explanation of my analytical process provides a story to my decision process in data analysis.

Confirmability, another criterion, relates to the researcher's biases and the extent to which research findings are free of his or her values and motives, and founded in the data (Bitsch, 2005). Confirmability is focused on the degree to which the study's results are based on the purpose of the research, rather than altered by the researcher's bias (Jensen, 2008). Confirmability entails research integrity based on the data and research process, where an audit trail should track data to its source, together with the researcher's explanation of the logic employed with the interpretation of data (Bitsch, 2005; Krefting, 1991). Krefting (1991, p. 221) refers to records that are important for illustrating confirmability. These are raw data, data analysis products, synthesis products, process notes, a field journal describing the researcher's intentions and outlook, as well as information about the development of data instruments. I maintained various records in the study.

It should however be highlighted, in light of the above, that the research approach

adopted is constructivist grounded theory in which the researcher forms part of the research process. Arguments may be made, in light of the researchers' participation, that researcher biases may be present and affect analysis, in particular during axial and selective coding. It is acknowledged that research bias may be present, but that bias forms part of the research method making use of participant observation.

## **7.7 ETHICAL CONSIDERATIONS**

Three criteria to ethical research are highlighted by Bless and Higson-Smith (1995). These are privacy or voluntary participation, anonymity and confidentiality. Ryan (2011) puts forward issues such as informed consent, confidentiality and trust. I consider ethical issues to research, in line with Bless and Higson-Smith, Ryan, Bitsch (2005), and Krefting (1991), to be: (a) The motive and conduct of the researcher; (b) the method employed; and (c) and consideration made of participants' by the researcher.

I entered this research with the aim of contributing to human resource development theory and practice. This aim is maintained provided the already reported responses to the respective research questions. The method of research, as documented with the research strategy, required data collection from participants with requirements of voluntary participation, anonymity, confidentiality and trust. Participation to this research was voluntary with an informed consent agreement between the researcher and participant. This agreement provided the purpose of the research, the use of the data collected, and anonymity. Anonymity was achieved by the use of codes to participants that replaced their identity. In addition, specific references made to organisations, for example, were not documented for reasons of anonymity and potential confidentiality. I believe participant trust in the researcher for allowing their participation was achieved by explanation of the purpose of research and data collection, and the agreement of anonymity and confidentiality.

## **7.8 CONCLUSION**

I have reached the point to the report where I am required to write a conclusion, and I admit that I have delayed writing it. It represents a closure, an end to a journey that

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took a few years to complete. A part of me is excited to be at this point of the journey, but, there is a side of reluctance as well. This is a reluctance to letting go.

I approach this conclusion by first making comments in conclusion of the research per se. I thereafter make comments in conclusion of the journey I walked with this study.

I started this report by placing emphasis to the importance of leadership and its development. I have pointed out that leaders at various levels continually need to learn new and often different ways (Matlay, 2000; Day, 2000). This learning is necessary so that the leadership system can effectively integrate social and technical sub-systems (Hall, 1988) in response to strategic demands.

I presented my view that deeply-seated, or fundamental, frameworks are required in strategic human resource management and leadership development for leadership development to become more effective in organisations. This I stated in view of reported lack of fundamental frameworks in strategic human resource management and leadership development are absent at large (Olivares, 2008; Day, 2000; Weiss & Molinaro, 2005; Ulrich & Smallwood, 2007; Verwey & Van der Merwe, 2012; Reichwald, Siebert & Moslein, 2005; Wright & McMahan, 1993; Wright & Gardner, 2000; Fleetwood & Hesketh, 2008; Becker & Huselid, 2010; Savaneviciene & Stankeviciute, 2010; Buller & McEvoy, 2012; Coetzer, & Sitlington, 2012).

It is in light of the aforementioned that I have set off to explore architecture for organisational leadership development. More particularly, I believe that a conceptual framework with logic of design considerations to an organisational leadership development system should be constructed. Particularly important is organisational contextual considerations to leadership development systems. Understanding such concerns would potentially enable the construction of architecture for leadership development, a framework of considerations with associated choices that contribute to the design and function of a leadership development system.

From the analysis of filed data emerged an architecture consisting of four default development systems, each with its respective characteristics, or logics that respond to different strategic contexts. The fundamental concerns to the four default

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development systems are (a) the predominant disposition the organisation hold to value creation, and (b) the leadership system's pattern to its thinking capacity.

The four default development systems, with its logics, are linked to organisational to strategy complexity by making use of a Strata Frame. This provides a dynamic logic to the architecture as any one of the default development systems is considered to better align to specific organisational strategy drivers and associated strategic complexity.

It is at this point that I am excited because of the architecture that emerged that allows better alignment of leadership development systems with organisational strategy complexity. However, the process of writing this conclusion represents an end to a journey. Or does it?

I consider writing this conclusion an end to a research project and not an end to my interest to leadership development architecture. I admit that the time spent on this project brought the need to make sacrifices to me and my family. I am grateful to my wife and children for enduring this journey with me.

This journey showed me that the concept of leadership development architecture, even though not widely contemplated, is broad reaching into leadership, the development of leadership, and organisational strategy. I am of the view that concluding this project represents a basis to further explore that concept of leadership development architecture. This project is hopefully not my last.

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## APPENDIX A: PARTICIPANT CONSENT FORM



TO FIND OUT  
JUST LOOK AROUND YOU  
**TOP 4%  
GLOBALLY**

RETHINK. REINVENT.

### INFORMED CONSENT AGREEMENT

This agreement serves to confirm that the research participant mentioned below gave her consent to participate in the Doctoral study regarding "Applying a Stratified Systems Theory Framework for creating an Organisational Leadership Development Architecture". The research participant agrees to provide the researcher with her experiences and views to the best of her ability.

The undersigned participant understands the purpose and nature of this study and understands that her participation is voluntary and that she may withdraw from the study at any time. The participant further grants permission for the data collected to be used in fulfilment of the requirements for the doctoral degree including an article, and any future publication(s).

The data collected will be used for research purposes only. The researcher undertakes neither to disclose the identity of any of the participants, nor the origin of any of the statements made by any of them. However, the undersigned participant understands that the nature and principles of this study's research methodology applies. This means that the researcher is expected to make use of verbatim statements from the transcribe taped interviews and/or excerpts from solicited essays and/or any other visual (e.g. photographs) in order to illustrate the everyday experiences of the research participants and their views in the thesis.

The participant undertakes to give a true representation of her experiences and views.

I, \_\_\_\_\_ the undersigned participant, agree to meet at mutually agreeable times and duration(s) or to other means of communication, e.g. by e-mail or telephone, as reasonably necessary to enable the researcher to complete the study. I further acknowledge that I received a copy of this agreement and that I may contact any one of the under mentioned if I have any subsequent queries.

Signature of research participant: \_\_\_\_\_

Researcher: JJH Hanekom

Tel: +27 (0)82 324 3735 Date: \_\_\_\_\_ 2018 Place: \_\_\_\_\_

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## APPENDIX B: EXAMPLE OF TRANSCRIPT

We do not look at the needs of new generations, not a consideration of how they would learn. There is a dilemma in the leadership space to be able to carry over the organisational wisdom of the past two generations to new generations. The learning institutions do not help, they focus to deliver curricula.	A4	2007.
Work with critical thinking skills rather with content. There is not content that would be owned by someone, there is curatorship of knowledge, and not ownership of knowledge. There is a paradigm issue in knowledge is power as it implies that knowledge is to be owned, and we move too fast for that. People have to, if we really wish to learn in the future, function in a VUCA world, in a post informational age, with the view that what I know today is old by tomorrow. How do I operate and live in that mindset?	A3 A2 A10	2008. 2006, 2006.
Need to highlight the concept of the VUCA world and the impact it has and the misalignment of the reality of the VUCA environment and how leadership development is approached. Most of the development is focused on the leaders as driver of procedural aspects, even in the domain of strategy, what models do we apply, we make 5 year plans which is too long. We do not assist guys sufficiently to cope with the uncertainty in the world, the fast changes. We are not fast enough. If I go back to learning and development. The standard architectures and what is used for design like ADDIE, it take too long. At the time that the module is fully drafted with the information that the person need to own, is the information old. Not enough is done to develop thinking skills.	A9 A11 A8	2005. 2004. 2008.
Development programmes and strategy, itself, can have a look at VUCA PRIME and develop that type of skills. Does the person have, in the volatile environment, enough vision, do we do enough work in leadership development around visioning and clarity. To replace complexity with clarity. How much time is spent to clarify concepts to get everyone on the same page, and to get everyone to stay on the same page. Clarity to labels that we provide, what labels mean. How do you work with the complexity in terms of the relationships that you establish?	A12 A7	2007; 2007.
If you are in the VUCA world, if you want to be in that environment, what is your counter. Is your leaders strong enough in the counter measure given the environment that you have.		



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## APPENDIX D: EXAMPLE OF MEMO

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a bit of a confusing jumble.

Extended Sub-view

Collaborative

Leadership in

Leadership of

Competitive

Internal view

Economic

Emphasis shifts as go higher in complexity of sys (org syst).

How meet the challenge?

and the sense making process. Leaders may hold to existing knowledge structures, or change, or hold both more than one. about what? With a very fundamental knowledge structure about organization in context of environment (Task-in-time Category) may be

in of

internally directed, or externally (Dual Core structure) or

Collaborative vs competitive (purpose)

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## APPENDIX E: USE OF DATA FRAGMENTS

Data fragments from different data sources that I considered to form the first set of substantive categories

A first set of substantive categories that followed the initial frame of provisional categories							
Category	Participant						
	Alpha	Bravo	Charlie	Delta	Echo	Foxtrot	Golf
1. Development systems seek out organisational purpose.	A1, 12	B1, 11	C1-3	D1	E11	F17	G5, 11
2. Multiplicity to direction	A2, 10-11, ,		C2, 4, 5, 7, 6 14, 18, 19, 20, 22	D1, 3, 10, 12, 22		F11	
3. Organisations bring about simplicity to learning paradigm.	A4, 13, 17	B3-5, 12	C13, 15, 23	D2, 9	E6, 7	F 14, 7	G3, 6
4. Development systems cultivate connectedness with environment.	A2, 10-12, 14-16, 18		C4, 8, 9, 15, 24	D5-7, 11, 15-17, 20	E4	F4	G7, 10, 12
5. Organisations uphold tradition in development	A6, 7, 9, 11		C18, 23	D22	E3, 5, 9	F6, 13	
6. Organisations uphold liberalism in development	A7, 8, 15	B6, 8, 9		D21	E12, 13, 14		G8
7. Development systems sustain wisdom	A3, 4		C11, 15, 17, 25	D11, 13, 19		F5, 8, 10, 14-16	G1
8. Development systems focus on qualities	A3	B10	C6	D17, 18	E3	F4, 7, 9, 10	G9

**ORGANISATIONAL LEADERSHIP DEVELOPMENT ARCHITECTURE WITH  
STRATIFIED SYSTEMS THEORY**

A first set of substantive categories that followed the initial frame of provisional categories							
Category	Participant						
	Alpha	Bravo	Charlie	Delta	Echo	Foxtrot	Golf
9. Development systems provide focus		X	C12, 16, 18, 19, 20	D1, 2	E3, 5, 9, 10	F10	

